

ANNANDALE & ESKDALE COUNCIL OF VOLUNTARY SERVICE

MAKING A GOOD APPLICATION

This toolkit is designed to help you make successful grant applications to funding bodies.

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1. MAKING A GOOD APPLICATION

1.1 GETTING STARTED

When deciding to seek funding for a project your group has to consider some basic questions. For instance, have you:

- Identified, and can clearly show that there is a need for your project?
- Gathered information/evidence to prove the need?
- Considered whether you should have partners to help share the work load?
- Decided who within your group can drive the project forward, are they capable of running the project and do they have enough free time to spend doing so?

You should also identify people who may be sympathetic and prepared to help:

- Who can you “co-opt” onto your committee to strengthen your position and/or help shape your project? (People with specific expertise and experience).
- Who should you inform about your project? (Local Councillors, partners, existing funders)
- Don't waste time and money re-inventing the wheel if others can help!

1.2 READY TO GO

Before beginning to prepare a funding application, check your plans once more to ensure you've covered such issues as:

- Sustainability (can your project support itself financially after the initial funding period);
- Realistic revenue projections (honest financial forecasts of weekly/monthly/annual income);
- Coherence (is your project easy to understand and explained logically); and
- Who is going to deal with any follow-up questions or calls

1.3 DESIGN A “FUNDABLE” PROJECT

You've identified the need for your project, but it doesn't automatically follow that a grant will be forthcoming. You will be in competition with other groups and will have to ensure that you have an attractive or 'fundable' project which is:

- Specific, i.e. a clearly identifiable aspect of your work or item of equipment
- Meeting an important need which is describable and measurable
- Beneficial to your community
- Supported by your community
- Achievable
- Cost effective, i.e. demonstrate value for money by providing a detailed breakdown of costs
- Topical, reflecting current concerns, practices and policy priorities
- Relevant to the concerns of the potential funders
- Appropriate in size to the potential funder; larger projects can be divided into smaller parts if necessary

1.4 STRUCTURING YOUR APPLICATION

An application should have clear structure. A suggested outline is:

- Project title;
- Introduction – who you are, what you do;
- Proposal Summary;
- The problem or need and who will benefit from the project;
- What you want to achieve;
- How you will do it;
- How you will monitor your results;
- How much money you will need; and
- How much money you will raise from your own and/or other funding sources.

When in doubt remember the **Five “M”s**© of project planning and grant applications. You need to provide information on the project's:

- **Mechanics:** What? Where? When? Aims & Objectives?
- **Market:** Why? Who for? Scale of demand & local support?
- **Management:** Who will manage the project? What track record do they have?
- **Money:** How much will it cost to set up and run? How much money will be raised locally?
- From whom do you expect to get the other funding? What assumptions have you made in the calculations?
- **Monitoring:** How will you measure the project's success? What targets will you set?

1.5 POTENTIAL FUNDERS

Now consider the possible sources of funding. You will have to:

- Research potential funders;
- Choose funders whose criteria your project potentially fits;
- Find out the funders' timetables or timescales for applications;
- State clearly where you hope to find *all* the funding.

Potential funders include:

- Public funding, i.e. the Council, central government, health trusts, public agencies
- Private funding, i.e. charitable trusts and foundations, businesses, sponsorship, donations
- Service organisations, e.g. the Rotary Club, religious organisations
- Special funds, e.g. The Big Lottery, BBC Children in Need
- European funding
- Your own efforts, e.g. events, charity shops, appeals, raffles, 100 clubs and membership schemes, legacies.

Know the differences between these funders: governments and foundations have clear funding policies; individuals will donate on a short term basis and are usually inspired by emotions or sympathies; companies wish to gain business benefits; a service organisation may help if you have personal contacts.

Find out what the various organisations are likely to fund; funding bodies publicise the types of project they are interested in supporting, so do some research. Some of the major funding sources, such as the Big Lottery, change their priorities from time to time, so make sure you have up-to-date information. There are reference manuals and software programmes available locally; by consulting them you will be able to target your application effectively

1.6 APPROACHING FUNDERS

Having researched potential funders for your planned project and drawn up a list of organisations to approach, the next stage is to find out the procedures for making applications, which will vary according to the organisation concerned.

Many funders will encourage applicants to discuss proposals beforehand and will be only too happy to advise you on your approach. Some provide guides to making a successful application. Read all documentation carefully. Some funders will expect you to complete standard application forms and will have deadline dates to comply with. Others prefer to receive a letter from applicants.

Talk to other groups who have been successful about their fundraising experiences and learn from them.

Target the funders you think will respond best to your particular area of interest and personalise the approach as much as possible.

Compile some background information about your group, its work, especially some success stories, its history and plans for the future, and work this into your application. Depending on the project, an area profile to show geographical remoteness or rural disadvantage, or other relevant criteria could be included, along with copies of reports, newsletters, minutes, newspaper cuttings and photos about your activities.

Discuss any documentation or application forms with your committee. Decide who is best suited to write the application. Remember, whoever signs the application form takes on personal responsibility for the accuracy of its contents. They, or another nominated group member, should also be prepared to be the telephone contact for the group during the assessment stage of the application, and, if a grant is awarded they will have to submit a report and possibly meet a representative from the funding body at a later stage.

Read all the literature, i.e. the application form and guidelines, *twice*. Write down which aspects of your work should be emphasised. Complete all sections of the form. Be concise and legible.

Ask someone to read your application with a critical eye before submitting it. Consider any potentially awkward questions the funder may ask.

Keep copies of your completed application forms and correspondence from the funding bodies.

Make yourself easily accessible to the funding body.

If successful, send a thank you letter and keep copies of publicity about your project as they will be useful for your feedback report.

1.7 SUBMITTING AN EFFECTIVE APPLICATION

It is important to make your application stand out and catch the attention of the person reading it. Spend time working on your application and if making several requests to different organisations tailor each application to the individual organisation concerned; *don't* simply copy the previous application.

Include evidence proving the specified need exists, e.g. the results of surveys you may have conducted, and the level of community support for and commitment to your project. Convince the funder that there is a need, that your proposed project will address the need, and that it is what local people want. Stress the difference the grant will make to your community.

Devise a plan setting down what you will have to do in order to carry out your project and achieve your aims. Stipulate the required resources, timescales, place, who will be responsible, how you will know when your aims have been reached. It is important to show quantifiable benefits, e.g. the number of people who will use your service.

Show accurate costs, e.g. quotes for items of equipment. Include copies of quotes if you have them. Be able to answer questions about your budget and the breakdown of costs, as the funder may ask these during the assessment stage.

Show you are well organised and capable of carrying out the planned project. Details of your management committee and their skills and experience, the procedures for elections and conducting meetings, as well as handling finances and accounting, will all help to show you have the capacity as a group to deliver the project. Funders may ask for a copy of your constitution and a statement of your accounts.

Explain how you intend to monitor and evaluate the success of the project, as the funders will be keen to see that the project has made a difference to the lives of people in the local community. Outline your evaluation methods, e.g. collecting statistical data on the numbers of people using your service, and how as a group you will use the information gained to adapt and improve your service.

1.8 APPLYING TO PRIVATE TRUSTS

Private Trusts encourage the building of a relationship with the organisations they fund through letters of application and assessment visits. Use the funding criteria supplied by individual Trusts to help you decide which to approach. If a telephone number and contact name are published, call and talk over your project with a member of staff before applying.

Your letter should take the form of a concise proposal accompanied by a specific letter of introduction. Explain why you are writing to that particular Trust. Write the letter to a 'real' person, i.e. a named member of staff. If a contact email address is published send a draft of your proposal for comments.

If applying for a small amount of money, two sides of A4 will suffice; larger amounts will require more details. Split your proposal into paragraphs and use bold text to emphasise important points. Don't write in capitals; it is less readable.

Your proposal should include a clear explanation of what you want to do, evidence of need and local support, how your project will both work with other groups and what makes it different. Enclose supporting information, e.g. photos, local statistics, case studies.

Include background information on the organisation, such as your charity number, annual accounts and review; don't send your constitution unless requested. Attach a business plan if your application is for a significant amount. Outline your achievements to date.

Include the timescale for your project and the key objectives and targets. Be open about the total amount of money needed and state that you would be happy to receive the whole amount or a contribution to this. State which other funders you have applied to (be advised that funding organisations co-ordinate their work and discuss projects). Explain any 'awkward' questions or situations (e.g. if you need extra funds due to the rise in cost of living, say so; don't allow the funder to make assumptions about why revenue may have been cut). Itemise the amounts you have raised locally.

Explain what benefits your clients will receive from your project and how you will monitor and evaluate it; this could be by questionnaires, independent evaluation, or simply regular feedback via word of mouth.

Be sure to include a legible signature and contact details: the Trust will hesitate to call you if they can't read your name.

If hosting an assessment visit, time it so that the assessor will be able to meet the beneficiaries of your project and see the activities taking place. However, be sure to provide a quiet place where you can talk in a relaxed, informal atmosphere. Be hospitable and provide refreshments; your assessor may have travelled a long way to see you! Don't get a consultant to meet the assessor on your behalf; they don't have your personal involvement. A visit is your chance to sell your organisation and project and to make a lasting impression. If the assessor has been won over by you personally they will act as an advocate and promote your project to their Trustees; often the views of the assessor will influence the Trustees' decision on whether or not to offer you a grant.

The assessor will be looking for enthusiasm and commitment to the project, signs that your project has the potential to make a difference, evidence of good planning and the capacity to run the proposed activity, evidence of local support, an honest appraisal of potential difficulties and evidence of sustainability (especially for capital grants). Build the assessor's confidence in all of the above and they will remember you and find it hard to say no!

If you are successful, tell the Trust what you have done with the grant via reports and newsletters. Remember, a Trust may fund you a second time and is more likely to do so if you have built up a relationship and made them interested in your project. If unsuccessful, phone and ask why; they will be happy to give you feedback on your application, but may not have the resources to write individual letters.

1.9 PRACTICAL TIPS

- If you can, always type up the application form.
- Make sure you enclose all of the documentation that is requested.
- Choose your referees carefully.
- Make sure your referees have a copy of the proposal.
- If an assessor calls to make an appointment, make sure you have plenty of time, and peace to speak to them.
- If the Trust or funder has a website, check it out *before* making the application.
- Letters of support from relevant prominent people may be useful.
- Don't hassle the funders.
- Always try and raise some money locally as a "community contribution to the project".
- Don't give up. If in doubt, ask the funder(s) for help or feedback on an unsuccessful bid.

1.10 HOW THE CVS CAN HELP

D&G Federation of CVS can either provide direct assistance or "signpost" you to the most appropriate organisation(s).

Each member CVS has a reference library of guides to the major trusts and grant awarding bodies and the **Funderfinder** database, a computer programme which holds information from the many thousands of private Trusts in Britain who distribute money to community. You can book a session to search these programmes using the criteria of how much you need to raise and who will benefit from your project, in our offices in Lochmaben, Dumfries & Stranraer.

We have also produced a number of information sheets on a variety of topics, and can publicise your fundraising events in our quarterly members' newsletter and on our websites.

2. SOURCES OF FUNDING

2.1 WHERE TO GO

Don't rely on only one source. Start with your existing contacts and find out how they can help:

- Your own trustees & management committee
- Your staff and volunteers
- Your supporters, past and present
- Users, past and present - who do they know? What can they give in terms of skills and/or cash?
- Those who have awarded you grants before (though not usually until one year has elapsed since the previous award).
- Those who have rejected previous applications but have not discouraged you from trying again.

Then consider all other sources of income:

- Local Authority & Health Board
- The Scottish Executive
- European funding
- The Big Lottery
- Grant-making trusts
- Companies (inc. gifts in kind, staff secondments, sponsorship/support)
- Fund-raising events
- Sponsored activities
- Membership subscriptions & other charges
- Donations from individuals
- Legacies

2.2 COMPANY DONATIONS

The main difference between corporate giving and grants from Trusts is that companies are not obliged to give and will generally want something in return, for example in the form of publicity for themselves. It is important to see it as a long-term relationship and not to make your initial approach until you have a proper business plan and proposal in place. Obtaining sponsorship usually involves you in quite stringent rules and restrictions, so watch out for this. It is less demanding (although probably also less lucrative) to request "support" rather than "sponsorship". Consider your local banks, supermarkets, etc. Some have a small budget that is administered locally, or you may need to contact the Head Office, highlighting their presence in your area.

Look for companies in your geographical area, or whose business somehow links in with your users or the work that you do. Refer to the *Directory of Social Change UK Guide to Company Giving* and other publications for detailed information on how best to prepare for an approach to a company as well as a list of possible contacts. Try to find a named person as a way in, or go through an employee. If calling cold, ask for the Marketing or Community Department.

3. FUNDRAISING IDEAS

As well as securing grants, there are a number of other ways that community groups can raise funds. This section outlines some of the general considerations that should be borne in mind by community groups before undertaking fundraising, the legal implications and some fundraising ideas.

GENERAL CONSIDERATIONS

Any fundraising event should be carefully planned. A committee or organising group should be established to set fundraising targets and work out how they are to be met. As with all appeals, a bank or building society account must be used and a Treasurer should be appointed to keep a check on the finances.

In addition, there are a number of other points that should be considered:

- An adequate insurance certificate must be obtained;
- Health & Safety regulations must be complied with.
- Food and drink must be deemed fit and safe, even if the public are not paying for it.
- For events held indoors, all fire regulations must be complied with.

JUMBLE SALES

Jumble sales are suitable for most types of organisation. They are relatively easy to organise and usually attract a good crowd. Nevertheless they tend not to be particularly lucrative, unless the organising group has established a reputation for quality.

The usual course of events is to book a local community hall at least one or two months in advance of the date of the jumble sale. Adverts should then be placed in local shops and papers to appeal for items to be sold. Two or three weeks before the sale, another set of adverts should be placed giving details of the venue and time.

RAFFLES

Raffles are games of chance and as such are defined as “lotteries” under the Lotteries and Amusements Act 1976 and the National Lottery Act 1993. Broadly speaking there are three types of lottery, each of which are subject to a set of legal conditions.

Private Lotteries:

Private lotteries must be confined to members of a club or society with the profit of the lottery being used to provide prizes to further the work of the society. These have limited fundraising potential, but are far less regulated than other types of lottery.

Small Lotteries:

Small lotteries are usually part of an “exempt entertainment” such as bazaar, dinner dance and sporting event. The lottery must take place on the premises where the main entertainment takes place and there must be no element of private gain in the running of either the lottery or the entertainment. Prizes must not exceed £250 in value.

Society Lotteries:

A society lottery is one conducted over a period of time for charitable purposes in which all of the profits must be returned to the purpose of the charity. An example would be 50-50 club.

SPONSORED EVENTS

There are a number of factors that can affect the success of a sponsored event e.g. the number of sponsors, the amounts donated and the “unusualness” of the event. A common problem is the number of competitors that lose interest in collecting their sponsorship money after the event. Here are a few ways to guard against this:

- Make it clear in writing that the total recorded after the event is expected to be paid by the competitor even if they do not collect all that is owed;
- Publish a realistic date by which all sponsorship monies must be paid in full; and
- Give three or four alternative contacts to pass funds and sponsorship forms to.

FURTHER INFORMATION

The Scottish Council of Voluntary Organisations (SCVO) booklet “Key to Fundraising Ideas Database” lists over 500 ideas and the Directory of Social Change publication “Tried and Tested Ideas for Raising Money Locally” offers useful advice. Further information on the legal framework applicable to fundraising in Scotland can be found in “The Scottish Code of Fundraising Practice”, published by the Institute of Fundraising Managers in collaboration with SCVO. Copies of the publications are available at your local CVS office.

A-Z DIRECTORY OF FUNDERS

This section has details of different funding organisations and what can be applied for. Please remember that **this list is only a selection** - there are many other funders.

THE ADAPT TRUST

Access for Disabled people to Arts Premises Today was established in 1989 as a result of the findings of the Attenborough report on 'Arts and Disabled People'. ADAPT can assist venues where the **main** activity is arts based. The Adapt Trust gives grants for capital and long-term improvements in access facilities for disabled people. 50% funding is available up to £3,000 if your building could be considered as an arts or heritage venue. There is a general grant fund and also one specifically for sight and sound improvements. There is no application form but a list of questions that need to be answered in any application.

Further applications from successful / unsuccessful venues **will not** be considered for a period of twelve months from the date of their most recent application

For details contact the ADAPT Trust, Wellpark, 120 Sydney Street, Glasgow G31 1JF
0141 556 2233

www.adapttrust.co.uk

AGE CONCERN SCOTLAND

The following grants available for Age Concern Scotland Members:

- **General Project Grants** of up to £1,000 to support the development of new projects or services for older people, or to develop an existing project or service so that more people can benefit or so that the quality of service can be improved
- **Small Equipment Grants** of up to £500 are available to help small, local groups purchase equipment or materials in order to support activities for older people. Priority is given to small local organisations, normally with an annual income of less than £10,000.
- **Special Assistance Grants** of up to £5,000 are available to start up a major new project or to significantly expand an existing project in order to improve the quality of life for older people in local communities. Only a few Special Assistance grants are awarded each year, at the beginning of the calendar year.
- **Conference and Training Grants** of up to £500 are available to enable member groups to develop and improve their work with older people through participation in relevant conferences and training events.

All grants are assessed by Age Concern Scotland's Grants Committee, which meets every two months. Applications will be accepted at any time.

Age Concern grants contact

Alan McMillan
Membership Resource Officer
Age Concern Scotland
Leonard Small House, 113 Rose Street
Edinburgh EH2 3DT
Telephone: 0131 625 9315
Fax: 0131 220 2779

AWARDS FOR ALL SCOTLAND

Awards for All is a partnership between four organisations that share out Lottery funds – the Scottish Arts Council, the Heritage Lottery Fund, sportscotland and the Big Lottery Fund. The Big Lottery Fund is the joint operating name of the New Opportunities Fund and the National Lottery Charities Board (which made grants under the name of the Community Fund).

A4A offers grants from £500 - £5000, and as such is one of the main sources for small grants in the UK. The programme supports community involvement through arts, sports, heritage and charitable activities. The aims of the scheme are to:

- Extend access and participation
- Increase skill and creativity
- Improve quality of life.
- Helping groups to become well organised

For an information pack contact 0845 600 2040 or visit www.awardsforall.org.uk/scotland/

BBC CHILDREN IN NEED

Grants are made to projects for disadvantaged children under 18. This can cover capital projects, playschemes, holidays or outings and equipment. It does not cover holidays abroad or medical research. Three year grants can be made for salary costs (though rarely above £25,000). Application deadlines are March and November each year.

Priority is given to projects for children with:

- Suffering from illness, distress, neglect or abuse
- Any kind of disability
- Behavioural or psychological problems
- Living in poverty or disadvantage.

For details contact 0208 576 7788 or visit www.bbc.co.uk/pudsey/

BIG LOTTERY FUND

The Big Lottery Fund has been created by merging the New Opportunities Fund and the Community Fund; at least 60% of funds will go to the voluntary sector through the new programmes.

During 2005 they will introduce a new set of programmes and new approaches to funding. In the course of 2005 they will wind down the Developing Communities Programme (the new name for the former Community Fund programme). Grants under the Developing Communities Programme will be made up until January 2006 and there is still plenty of time for projects to apply under this programme; outline proposal forms will continue to be available until 31 May 2005. Those applicants who are advised that their project may be funded have until 31 August to send in a full application.

The BIG Lottery Scotland has launched the ACTIVE FUTURES programme; this aims to support projects working together in partnership that target young women, disabled people, and/or people from black and ethnic minority communities.

Projects should be able to demonstrate how they are able to encourage disadvantaged 17-24 year olds to become involved in regular sport and physical activities, or increase/sustain their participation levels. Projects can apply for a minimum grant of £50,000 and a maximum of £500,000 spread over one to three years. However, applicants looking for more than £200,000 must contact the Enquiries and Information team to discuss this before they apply. For more information and advice please contact our Enquiries and Information team on 0870 240 2391.

For further information visit the Big Lottery Fund website, www.biglotteryfund.org.uk or telephone the advice line on 0870 240 2391.

CAMELOT FOUNDATION

Under its *Transforming Lives* programme, which runs until 2009, £2m per year will be allocated in grants for projects dealing with these priority groups:

- Young parents, or those at risk of becoming young parents
- Young people with mental health problems
- Young asylum seekers
- Young people with disabilities

Projects should be about bringing marginalised young people into the mainstream. Grants are for £10,000 - £90,000 spread over three years.

Camelot also run an additional award scheme called 4front Awards. This award is for young people aged 11 – 25 to enable them to turn their ideas into reality. Individuals or a group of young people can be awarded up to £3,000. There are 8 awards allocated each year. The idea must make a difference to the lives of other young people and applications are made by submitting a short video.

For more information contact the Foundation on 020 7828 6085 or visit www.camelotfoundation.org.uk

CHARITIES AID FOUNDATION

CAF make grants to improve the effectiveness and long- term viability of organisations (including IT, organisational development, training and consultancy). It has specific programmes to support second tier organisations and black and ethnic minority organisations with income under £50,000.

CAF also offer a range of professional and technical services to voluntary groups including the CAF Charity card (a charity debit card). For details contact 01732 520 334 or visit www.cafonline.org.uk

THE CHASE CHARITY

The charity works throughout the United Kingdom with the exception of Northern Ireland and the Greater London area, and welcomes applications from groups who feel isolated by their location. Only registered charities may apply, and the charity prefers to support smaller charities, many of whom will have only a local or regional remit. Minimum grant award is £1,000 up to £30,000 for larger grants. Main areas of interest are the Arts, Heritage and Social Welfare

For details contact the Chase Charity, 2 The Court, High Street, Harwell, Didcot, Oxfordshire OX11 0EY, telephone 01235 820044.

www.chase-charity.org.uk

COMIC RELIEF

Comic Relief funds projects under four themes:

- Fighting for justice for disadvantaged groups
- Services for refugees and women faced with domestic violence
- Supporting vulnerable young people
- Supporting deprived neighbourhoods

For details of how to apply send a stamped addressed envelope to UK Grants Team, Comic Relief, 5th Floor 89 Albert Embankment, London SE1 7TP or visit

www.comicrelief.org.uk

ESMEE FAIRBAIRN CHARITABLE TRUST

The Trust makes grants under four headings:

- **Arts and Heritage** (Serving Audiences and Supporting Artists. Preserving and providing public access to our national heritage)
- **Education** (New approaches to education and Hard-to-reach learners)
- **Environment** (projects that prevent environmental degradation whilst recognising legitimate aspirations for housing, goods, transport and leisure activities)
- **Social development** (to improve the lives of people and communities facing disadvantage)

It favours projects that are innovative and will have a practical impact on a particular problem. It does not fund capital costs or equipment, affiliate members of national charities, sports groups, individual schools, nurseries or playgroups, religious projects or animal welfare.

Applications for under £20,000 can be up to six sides of A4 and applications for over £20,000 can be up to and occasionally more than ten sides of A4. Applications over £100,000 should discuss their project with the Trust in advance.

The Trust also makes loans of between £10,000 to £250,000 for projects that it would not normally fund by grant.

For details of any of the above, contact 020 7297 4700 or visit www.esmeefairbairn.org.uk

FUTUREBUILDERS

Futurebuilders is a new £125 million government investment fund, being run by people from the voluntary sector, which aims to increase the role that the voluntary and community sector plays in the delivery of public services.

Futurebuilders want to invest in around 250 organisations, with investments ranging from around £30,000 to several million, as well as providing development grants of around £10,000 to a number of applicants. The Fund is predominantly a capital and loan investment fund. The Fund has the following funding themes:

- Community cohesion;
- Crime;
- Education & Learning;
- Health & Social Care;
- Support for Children & Young People.

There will be at least one “window” for bids in 2005 and possibly two smaller ones before January 2006.

Applications will initially be assessed and a decision will be made whether to recommend shortlisting the application for full assessment. If your application is shortlisted, further detailed information will be requested including a business plan. The full assessment process may entail an assessment visit to your organisation. For further information and an application pack, see: www.futurebuilders-england.org.uk.

THE GANNOCHY TRUST

The Trust has general charitable purposes, but in particular to promote the charitable needs of youth and recreation. The benefit of all donations must be confined to Scotland. There is an obligation to show preference for charities in Perth and its environs.

Contact them at The Gannochy Trust, Kincarrathie House Drive, Pitcullen Terrace, Perth, PH2 7HX, telephone 01738 620 653.

GARFIELD WESTON FOUNDATION

The Foundation provides funding to registered charities operating in the areas of: religion; education; environment and health.

Grants can be from £2,000 to over £500,000 although there is a separate Small Grants Scheme for awards of less than £5,000

For details contact 020 7589 6363 or write to: The Administrator, Weston Centre, Bowater House, 68 Knightsbridge London SW1X 7LR

HERITAGE LOTTERY FUND

The Fund gives grants to protect and improve heritage assets and make long term improvements to the quality of life of residents. This includes:

- Natural habitats and countryside
- Urban green spaces and parks
- Historic buildings and sites (including places of worship)
- Museum collections and historic archives
- Industrial and transport heritage

The main programmes include:

Awards for All: See above.

Your Heritage: for grants of between £5000 and £50,000.

Heritage Grants: offers £50,000 or more to organisations which aim to look after and enhance the UK's heritage, increase involvement in heritage activities and to improve access to and enjoyment of heritage.

Repair Grants for Places of Worship: is designed to help conserve and sustain heritage at risk, through urgent repairs to places of worship. The UK-wide scheme is delivered through four programmes in England, Northern Ireland, Scotland and Wales.

Townscape Heritage Initiative: to help communities regenerate the historic parts of their towns and cities.

Public Parks Initiatives: helps with the restoration and regeneration of historic parks and gardens, including urban squares and cemeteries.

Landscape Partnerships: allows partnerships representing a range of heritage and community interests to tackle the needs of landscapes, whose various elements may be in different ownership.

Young Roots: offers grants of between £5000 and £25,000 to promote the involvement of young people of 13-20 years age in their heritage.

For details contact 020 7591 6042 or visit www.hlf.org.uk

THE HUGH FRASER FOUNDATION

The Foundation was established in 1960 by Sir Hugh Fraser. Trustees favour smaller, more focused causes rather than large highly publicised appeals. Grants are often made in successive years in order to maintain their momentum and effectiveness.

Main areas of interest are arts organisations, and organizations working with the handicapped, the underprivileged and the aged. The Trustees pay special regard to applications from the West of Scotland and from parts of Scotland where the local economy makes fund-raising difficult. However, applications from other parts of Scotland are considered. Grants range from £1,000 to £100,000. Apply by letter of application, enclosing a copy of your latest accounts with the letter; trustees meet quarterly to consider applications.

Submit applications to Heather Thompson, The Hugh Fraser Foundation, Turcan Connell, Princess Exchange, 1 Earl Grey Street, EDINBURGH, EH3 9EE.
Telephone 0131 228 8111; e-mail ht@turcanconnell

THE LANKELLY FOUNDATION

The Lankelly Foundation's original brief was for general charitable purposes but over the years the Trustees have refined their grantmaking policies. They continue to help in wide areas of social need, responding to the needs identified by those directly involved in the provision of services.

Grants of up to £10,000 are given for capital projects. The minimum grant is £5,000. It takes at least 6 months from the initial enquiry before the application would be considered by the Trustees. One of the current priorities is neighbourhood work where there is user involvement and where communities are working to create a positive environment in which people can flourish. There is no application form but guidelines are given as to what to include in the application letter.

Contact the Foundation at 2 The Court, High Street, Harwell, Didcot, Oxfordshire OX11 0EY, telephone 01235 820044.
www.lankelly-foundation.org.uk.

LLOYDS TSB FOUNDATION FOR SCOTLAND

Lloyds TSB is a grant-making trust and makes donations to recognised charities in Scotland. It operates five different funding programmes nationally

- Standard Grant Scheme
- Capacity Building
- Partnership Drugs Initiative
- Overseas Scheme
- Staff Matched Giving

The Standard Grant Scheme forms the core of their work. The Capacity Building grant scheme is designed to assist small and fragile organisations to build their infrastructure

and make them sustainable for the future; the Partnership Drugs Initiative works on a groundbreaking programme with the Scottish Executive and Atlantic Philanthropies; the Overseas Programme offers funding to Scottish organisations working in development overseas and the Staff Matched Giving Scheme rewards Lloyds TSB Group staff's fundraising efforts.

All programmes are subject to assessment and each has a different application procedure.

Contact the Foundation on 0870 902 120; website: www.fundingthefuture.org.uk

MILLENNIUM AWARDS

There is a range of different schemes offering Millennium Awards. The key difference is that these offer grants to individuals (or groups of people) to run a project for the benefit of their area or their community.

The Millennium Commission website has links to 114 separate Award programmes (see www.millennium.gov.uk/cgi-site/awards.cgi). These are situated throughout the country.

Successful applicants are invited to join the Millennium Awards Fellowship. The Fellowship celebrates the achievements of Award winners and helps them share their skills as active citizens. A full list of winners and their profiles can be found on www.starpeople.org.uk

PAUL HAMLYN FOUNDATION

The Foundation's primary concern is to address issues of inequality and disadvantage, particularly in relation to young people. Support concentrates on projects in the UK which respond to these challenges through the arts and education. The Foundation also supports a number of local projects in India

With the increased funds from Paul Hamlyn's bequest, the Foundation recently has devised a number of special projects. These focus on areas where there is an urgent need for positive change in the interests of young people who are not benefiting from the arts or education.

The projects are:-

- the Reading and Libraries Challenge Fund,
- Musical Futures,
- Refugee and Asylum Seeker Young People, and
- 'What's the Big Idea?' for projects in Northern Ireland

Applications for sums of £5,000 or less are handled by a **Small Grants Committee** which meets monthly, except August and December. Grants will be made for one year only and applications in consecutive years from the same organisation will not normally be considered. Details of how to apply for higher amounts (no limit) can be found on the foundation website

It is essential that you discuss your proposal informally with the Foundation's grants officers on 020 7227 3500. For further information visit www.phf.org.uk

PERCY BILTON CHARITY LTD

Only groups registered as charities, or youth organisations registered with their local authority may apply. The Percy Bilton Charity offers two types of funding:

- Small Grants up to £500 for furniture and equipment for small projects;
- Large Grants up to £40,000.

Themes include Young People, Old People, Disabled People, and Medicine. Awards are usually for capital costs and can be spread over several years.

In addition, The Charity considers one-off payments up to £200 to older people, disabled people or those suffering from a medical or mental illness. Applications must be made by a Social Worker employed by the Local or Health Authority.

For major building projects you must secure 75% of the funding before applying since the balance of funding must be obtained within a year of any grant.

For details of how to apply contact 020 8579 2829, or the Administrator at Bilton House, 54 Uxbridge Road, London, W5 2TL

THE SCOTTISH COMMUNITY FOUNDATION

The Foundation has distributed over **£6 million** in grants across Scotland since 1995. Currently grants are only available for constituted community groups with an income of less than £250,000 per annum. There is no closing date for applications.

Small Grant Applications are up to £1,000; *Community Grants* are one-off sums of up to £5,000. Both assist charities and groups improving the quality of life and life chances in Scotland, especially in circumstances where funding is particularly hard to find and where a grant can achieve significant impact in enabling groups to fulfil their own objectives. Grants are made to groups across a wide spectrum of social welfare and community development activities. Main priorities are child protection, family law & justice; access to justice; older people & their families.

Applications are by outline proposal, before submission of a full application. Trustees meet in March, July & November to consider applications. Contact the Grant Enquiry Line on 0141 225 6670 for more details.

www.scottishcommunityfoundation.com

THE TUDOR TRUST

The Tudor Trust makes grants (usually £1,000 or more) to projects targeting young people (aged 9-18), families and older people living in marginalised communities. Their priorities include:

- Youth
- Older people
- Community

- Relationships
- Housing
- Mental Health
- Substance misuse
- Learning
- Financial security
- Criminal Justice
- New ideas not listed above that meet the Trust's overall aims

The Trust reviews its priorities every six months; it has also has a long list of exclusions. There is no specific application form and applications can be made throughout the year. For details contact 020 7727 8522 or visit www.tudortrust.org.uk

YAPP CHARITABLE TRUST

The Trust makes grants of up to £3,000 to small UK charities (that have been operating for at least 3 years) with annual expenditure of less than £60,000 for work with:

- elderly people
- children and young people aged 5 - 25
- people with disabilities or mental health problems
- people trying to overcome life-limiting problems of a social, rather than medical, origin such as addiction, relationship difficulties, abuse, a history of offending
- education and learning (including life long learning)

Contact 01484 683 403 or visit www.yappcharitabletrust.org.uk

5. DISCLAIMER

This Toolkit has been produced on behalf of Dumfries & Galloway Federation of CVS to assist community groups to make funding applications. However, it should not be taken as a definitive guide covering all areas of concern and it is recommended that further advice is sought where appropriate.

6. ACKNOWLEDGMENTS

Dumfries & Galloway Federation of CVS gratefully acknowledges the information available from the following organisations in preparing this Toolkit:

- Barnet CVS
- Ealing CVS
- Esmee Fairbairn Foundation
- Inverness & Nairn Enterprise
- Kyle & Lochalsh CVS

APPENDIX A – WRITING A GOOD APPLICATION SUMMARY

WRITING A GOOD APPLICATION FORM – KEY POINTS

GOOD PRACTICE TIPS

In filling in an application form certain basic questions need to be answered. These might include:

- Who your group is
- What you do
- What your track record is
- Do you have a constitution
- What you want funding for and how much
- How you intend carrying out your project (including use of staff/volunteers, location and timescale)
- Who will benefit from your project
- How you will measure your project's success
- Does the application fit the funder's priorities
- Why your project deserves funding compared to others - does it have anything special or unusual to make it memorable
- What is your organisation's budget

Most funders give guidelines with their application forms - *read these carefully*.

The most common reasons applications get turned down are:

- Your project does not fit the funder's criteria or priorities
- The application form is wrongly filled in
- Documents requested by the funder have not been attached to the application form (e.g., constitution, accounts)

POINTS TO REMEMBER

- It is important to write clearly, as those assessing applications will always be pushed for time.
- Don't exaggerate how much funding you will need - but don't underestimate this.
- Some grant application forms have boxes to complete - use the size of the boxes to gauge the amount of detail expected in your answers.
- Always photocopy the application form and *complete a draft bid*, so that you know your reply fits.
- At the very least, complete your form in neatly written black ink (or word processed), and keep copies. It is worth getting someone not connected with your group to read it to make sure your application form is legible and understandable.
- Funding applications are time consuming - both applying and in getting a final decision. The process can take months, so *build realistic time-scales into your plan*.

LARGER FUNDING APPLICATIONS

For larger grants – for example, employing a paid worker – potential funders ask for a lot more information.

You need to convince the funder that your organisation can *plan ahead*.

In addition to the questions outlined above funders might ask:

- How do you know there is a need for your project
- Are you sure you are not duplicating existing work
- How will you publicise the project to potential users
- How will your project work in partnership with other local organisations, local people, the Council
- What systems are in place to manage the project
- What systems are in place to manage the money
- What are the skills and experience of your staff, trustees and volunteers
- How does your organisation monitor and evaluate the quality of its work
- How will you assess user satisfaction with your project
- What plans do you have if something goes wrong, for example, fewer people make use of your project or a key member of staff leaves
- Will your organisation be bringing in some of its own money or resources to the project ('match funding')
- What will happen when the funding runs out

If you can't answer most of the above then you will have trouble finding funding – or if you did succeed, in running your project.

For smaller grants these questions may not be so important. But for larger grants these questions can only really be answered when you have a proper *forward plan* for your organisation. It is important that the organisation as a whole owns this plan and it is not left to one or two individuals to get on with fundraising in isolation.

Research for a larger funding application should include an awareness of: other local groups doing similar work, how your work complements other projects, local 'networks' of organisations working in your field - and how you intend to work with them. The emphasis of a lot of larger funders is about partnership working by your organisation with others. It can be helpful to get hold of relevant literature such as Annual Reports of funding bodies and contact potential funders to find out their current priorities.

'CORE COSTS'

Funders want to be involved in projects where their money makes a measurable difference, and as getting funding for existing activities is difficult, this means a 'project based' approach should be considered. Most funders will not directly fund what are called "core costs" or "central costs" or "overheads" - they usually wish to see their funding directed towards a piece of work ("project") with clear results. However all organisations incur additional costs to run the new project (e.g. administration, payroll, accommodation IT, insurance). It is therefore important when you apply for grants to *include in the*

proposed budget a contribution towards overheads. As a "rule of thumb" funders will not usually accept more than the equivalent of 10% of the project's costs. Be prepared to justify it.

SUMMARY

- Find out if you have to fill in an application form or write a letter
- For the purpose of a letter write no more than two sides of A4
- Practice writing your bid on a photocopied version of the application form
- Select a catchy, appropriate project title
- Make sure that your application looks good, neat and legible - but not too "glossy"
- Make sure that it says who you are and what you do
- Establish your credibility as an organisation/partnership
- Prove that there is a concrete need/demand for the project
- State how much money you need, what you need the money for and why
- Do not necessarily bid for the maximum grant available - be realistic
- Ensure that your budget is comprehensive, adds up and is realistic
- Show your enthusiasm for the project, but be objective
- Show how you plan to monitor/evaluate the project
- Show what will happen to the project when the money runs out
- Enclose appropriate supporting material - accounts, budget, Annual Report, Constitution, leaflets.
- Address your application to the correct person and use their job title (spelt right!)

APPENDIX B – SAMPLE PROJECT WORKPLAN

Esmee Fairbairn Foundation Example of a Workplan

Note: this is one example of a workplan. You may want to amend the format used to suit your own particular project's needs. There may be an alternative format that you feel is more helpful to your own work planning and tracking. This is provided as a guide.

The key aims/purposes of your work	Activities	Date for completion of each activity	What will success look like and how will it be measured?	Progress including any unexpected results (to be updated from time-to-time e.g.six-monthly)
<i>e.g. Improve the creative writing skills of 20 prisoners, as part of a programme to boost their education.</i>	<i>e.g. a course of 20 one-to-one tutorials for prisoners lead by a creative writing Tutor.</i>	<i>e.g. Within six-months of start date (1 Jan 2003).</i>	<i>e.g. 20 prisoners to have attended the course, and produced a short story of their own. This to be put forward as part of their coursework towards an accredited educational qualification.</i>	<i>e.g. 16 prisoners have now completed the course. Two prisoners were transferred to another prison and couldn't complete the course having started it. The remaining two prisoners' courses are planned to start next month.</i>
1.				
2.				
3.				
4.				