



Granting you the money

A GUIDE TO SECURING GRANT FUNDING

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This toolkit has evolved from our experience on the other side of the funding fence. In the course of appraising grant applications we have seen many of the common traps people fall into and we hope that by following the guidelines laid down here you will be able to avoid these pitfalls and optimise your chances of securing the funding you want.

Obtaining the right grant can be critical to the success of a project – so it follows that a poorly prepared application can be costly in terms of time and resources, as well as potentially having a knock on effect on other activities in your organisation.

1. INITIAL PREPARATION

It pays to invest plenty of time in the application process, especially the initial research and preparation stages. Time spent now should reap rewards not only in terms of securing funding, but will also ensure that the project for which you are applying for funding is well thought out. This toolkit is intended to ensure that you optimise your chances of obtaining funding for your project in the most effective manner.

Your project

The first step is to crystallise the scheme or project for which you are seeking funding. This will make it easier to prepare a short-list of potential funding sources. Critically, you should never do this in reverse i.e. identify a funding source and then try to fit your activities to the particular criteria – at best your application will fail or worse, you may obtain funding but be deflected from your core objectives or unable to deliver on the project outcomes, and you should never start the project before funding has been awarded.

Formulate what you hope to achieve and approximately how much money you think you will need. It may be helpful to break the project down into separate elements e.g. training, equipment etc. and seek different funding for the separate elements or, if the project is too large, to divide it into smaller schemes.

Funding Sources

It may be (if you are lucky) that there is one obvious source, in which case you can skip the rest of the research process and jump straight to the next stage. More likely, given the ever-changing nature of funding, you will be aiming to draw up a short-list of potential grant makers whose schemes and criteria you can then examine more carefully before deciding which to apply for.

If you are starting from scratch with a brand new project or organisation, it may be tempting to hire a 'grant finding' consultant to do the work for you. However, this denies your organisation the opportunity to build up expertise in house - a potentially vital resource for future projects and development.

There is no substitute for keeping yourself abreast of funding developments in your area of activity - new schemes are being launched all the time (and existing schemes withdrawn) and success is often highest in the early stages of new schemes - not only are funders keen to receive applications and make awards but also competition from other applicants is likely to be less.

2. ENSURING GOOD COMMUNICATION

The Grant-Making Organisation

Before making your application it is worthwhile investing time in fostering a relationship with the grant-making organisation. If you can, cultivate a champion in house e.g. get the case officer on your side or, possibly, a trustee (although whatever you do, don't try to circumvent due process). You may be given an indication of whether or not your project is likely to succeed before you spend time and other resources on putting your bid together, and you may be given some tips on how to frame your application.

This can work both ways as funders do not want to be overwhelmed with ineligible projects - but remember, they are busy people so strike a balance between a good working relationship and becoming a pest! This is particularly important with smaller trusts that may rely on a few volunteers to administer grants.

In House

Communication in house is important too – make sure that members of your management team are involved in the decision to make an application and that you are all agreed on what you want. Ensure that all applications are co-ordinated - two applications from the same organisation do not make a good impression. You should also be aware of any previous grants awarded to your organisation by the funder and acknowledge them in the application.

Do remember – no pot of money is infinite so you are competing for scarce resources at all times with many other applicants so a well-prepared and timely application stands a much better chance than one dashed off as the deadline is approaching.

3. PUTTING IN THE GROUNDWORK

The Grant Scheme

It is important to be well prepared before starting work on the application itself. The first thing to do is to familiarise yourself with the details of scheme and any published guidelines: what it is seeking to achieve, what the eligibility criteria are, what outcomes you will be expected to deliver (and monitor).

If you are applying to more than one organisation make sure that your application is tailored to the specific objectives of each scheme - don't just prepare a standard application for all bids. Make sure that you have read the terms and conditions carefully and that you will be able to fulfil them.

If possible, find out what other projects have already been funded and, if appropriate, contact the applicants. They may be able to offer advice on what the

grant-giving organisation is looking for and, if they're working in your field, there may be wider benefits to collaboration.

Acquaint yourself with the organisational structure of the grant provider (e.g. regional or national, where are applications handled, is there a different process for large and small grants) and its committee procedures. It's no good expecting your grant to be approved next month if the committee only meets three times a year so try to apply well before you need the money.

Your Project

Now is the time to refine the details your project. Don't go overboard (for example providing a full feasibility study when it's not called for), but make sure you know how much money you will need and, if revenue funding, how long you will need the money for and what you will do when it runs out. Be clear who you are targeting with the project and what outcomes you hope to achieve (bearing in mind the guidelines for the specific scheme).

Your Organisation

You may be required to produce a business plan. If you do not already have one this can be a useful exercise, helping bring your organisation's objectives into focus. If you already have one, you may need to modify it - but beware of making major changes, you shouldn't be changing organisational direction just to secure funding.

Consider your organisational structure (does the funder require this to be more formally constituted before it will pay out), your marketing and promotional strategy (you might like to include brochures of previous projects, if relevant) and your resources (both financial and human). This is a good time to ascertain whether you have the necessary skills and capacity to deliver the project - if not you may need to train, recruit or outsource some of the work.

4. COMPLETING THE APPLICATION

Finally you can get down to the application itself. This will often be easier if an application form is provided, as this ensures you provide all the information that the funder requires and will tend to stop you going overboard with detail. However, do make sure you answer all the questions.

If there is no form, you will have to be more disciplined. Limit your application to a couple of pages or so – a short, well-constructed letter will have more impact than a long and rambling one.

Matching Your Scheme to Their Objectives

Your application should be in respect of a specific project, rather than a general request for funds and should make clear how the project will meet the objectives of the funding organisation. Be creative in your thinking here, you may envisage a narrow set of outcomes specific to your own organisation's objectives but there are likely to be wider benefits and outcomes as well e.g. local job creation, environmental enhancement, improved marketing etc.

You need to have a carefully costed budget, which does not understate or omit relevant expenditure – it is difficult to get additional funding once the initial award has been made. Look at other projects the organisation has funded and make sure you ask for the 'right' amount of money – not too much from a small scheme or too little from a large one!

If you are not seeking funding for the entire project make clear where the additional money is coming from. In particular, if the awarding organisation requires matching funding, provide evidence that you have secured this.

Attention to Detail

Attention to detail is vital. Make sure that you have included all the information requested (prepare a check list if one is not provided) but don't go over the top with attachments if they are not called for. A word processed application is easier

to read (and spell check) but don't forget to include relevant signatures and contact details (e.g. trustees, references, accountant etc). Provide one main point of contact (preferably the person who has already established the relationship with the potential funder). Avoid using abbreviations (unless you spell them out clearly at the start) or jargon - this may be clear to you but meaningless to the grant giver.

Finally, get someone else (preferably uninvolved with the project) to read through the completed application, checking that it makes sense, figures add up and that it shows your project in the best light. Take a photocopy and make sure that more than one person in house can field any queries on it.

5. FOLLOWING THROUGH

Try to familiarise yourself with what happens next. This avoids wasting both your own and the funder's time. Some organisations will deal with applications by letter only, some will accept telephone enquiries and others will insist on a visit. However, do keep the funder informed of any relevant changes in circumstances during this period.

If the funder is going to visit, be well prepared and give clear directions to the project (or your offices if different). If you cannot establish beforehand who they want to see make sure that everyone, including consultants, is available if necessary and is well briefed. Try and find out how long they will stay and what exactly they want to see. This is your chance to bring the paper application to life so be enthusiastic and make sure you leave a good impression.

If You Have Been Successful

If you are lucky enough to be awarded funding, make sure you acknowledge the offer and send a letter of thanks. This is the first step to maintaining a continuing relationship with your funder, who may then be more inclined to alert you to new schemes and supportive to funding future projects.

Unless absolutely unavoidable, do not change the project. If it really cannot be helped, advise the funder of the changes and the reason for them. In such circumstances they may be able to vary the drawdown of payments or help with alternative sources of funding.

Make sure that you gain maximum publicity for your project (and your funder). This will help generate local goodwill and will be useful in future funding applications. Keep your funder apprised of any other positive developments or publicity e.g. increased funding for expansion, awards gained by the project etc.

Ensure that you comply with all the terms and conditions of the grant. You may well be monitoring outcomes for your own purposes - and if not you should be - but your funder may also require you to monitor specific outcomes. You should have systems in place to supply the information in accordance with the funder's needs, but do not send information more often than requested. Similarly, your funder may ask for regular financial reports and information, again ensure that you supply these in accordance with their requirements.

There are no magic answers and no real shortcuts when it comes to securing the best grant for your organisation. It is rather like building a house – it is important to lay good foundations, make sure all the preparation and groundwork is done, pay attention to detail and make sure the whole process is well managed. Much of the foregoing is common sense but you would be surprised how many applications are received unsigned, or with a budget that does not add up!