

Successful Fundraising

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Designer Maker West Midlands 'Finding out about Funding'

Successful Fundraising

Part One:

1. Introduction:

Fundraising, like the process of making desirable objects, is a combination of flair, an eye for detail and sustained hard work. In the same way that a poorly resolved design won't connect with people, a poorly crafted funding application is unlikely to succeed. I find the most palatable way to approach fundraising is to redefine the task as an extension of your marketing activity – where you promote your ideas for the future within the application and the funder can choose to invest (or not) in your vision.

Fundraising used to be about filling in forms and applying for grants. It then morphed somewhat – so that artists and makers had to be fulfilling one or other of the funder's strategic aims in order to qualify for funding. It's changing again - but the success of your efforts will still be tied to quality, track record and a synergy with the funder's objectives. Get the formula right and your chances of success will increase accordingly.

1.1 Building good relationships:

The most successful individuals base their strategies upon well-developed networks and relationships – often setting those relationships up well in advance of asking for money or support. This synergy, built up over a period of years, is a powerful tool for future success.

In order to do this, you need to identify and prioritise the relationships that have greatest potential and then work to develop and maintain those relationships until such time as any funding or partnership potential needs to be unlocked.

This effort will need to be maintained over a long period of time – pretty much as long as you want to continue accessing funding, in fact.

It's important to try and figure out who might be both supporters/champions of your work and a potential funder for it. And build a list of those contacts.

1.2 Position yourself for success:

You need to be able to capture the essence of what you do, and build your fundraising profile by communicating that effectively. It's not just about the work – it's also about you and how you present the whole package. On a cultural leadership course recently, one of the leaders expressed this as

finding your personal DNA – what is it that says ‘this is unique to me’? If you can capture that essence, it will help enormously. Others can help you work out what these attributes are – and help you define your personal brand.

1.3. Joined up thinking:

Your fundraising strategy, business plan, marketing, and fundraising efforts should all be linked seamlessly together. Your website, brochures and fliers need to carry key messages about your work and working philosophy. The ‘brand’ is important, and visual identity must be both distinctive and extremely professional. Your funding will come from people who are comfortable with the image you portray. There is a lot to be said for leading the design process with the website and undertaking some peer review to check the look and feel of the site with a limited audience before going public. This way, feedback can be solicited from key people and any costly blunders avoided. This can then be followed by production of print material in the knowledge that the brand has been tested.

1.4 Programme of Work:

You need to go to funders with evidence of a well-defined programme of work – with objectives and clear targets for achieving well-defined outcomes – not general requests for funding. The programme of work needs to be clearly set out in streams that match specific funders interests as closely as possible. Your business plan should also identify these ambitions clearly.

1.5 Planning and Research:

It is important not to underestimate the time that must be spent on research – all fundraising requires an investment of time, and therefore has a cost. You need to determine just how much time you are prepared to devote to fundraising in relation to the amounts of money you wish to raise.

Funding (and income) for your business should stream in from multiple sources, not just any one single source – thereby lessening the risk to yourself if any single source dries up or if a funder changes their funding policy (as they regularly do). For substantial projects, it’s usually good to think about approaching more than one funder.

Whatever you do, don’t try and cut corners at this stage. Do some thorough research and try and come up with your own list of places/people to apply to. Don’t rely solely on Craft Council or Arts Council lists or sources – apart from anything else, competition is fiercer because everyone else is looking there!

Talk to people in the know, and get good current information – almost any list of recommended sources of funding will begin to go out of date as soon as it is printed. Application deadlines come and go, and funder’s priorities change on a regular basis. When you have good information, act on it immediately – if only to ring up and scope out your idea – then you can get on the funder’s radar and you are more likely to be updated as things move on.

Any good public library will have a selection of grant giving directories – but surprisingly, places like your local Council for Voluntary Services are more likely to have recent directories, plus access to services like Funderfinder – which is just one of a number of online grant search tools.

Go to the website of the **Directory for Social Change** (<http://www.dsc.org.uk/Publications/Fundraisingwebsites>) and look in their fundraising section. You'll find information on funding for Individuals, Trusts and Foundations, business giving, and wider government sources such as the Department for Culture, Media and Sport.

1.6 Making contact with potential funders:

There is a tried and tested methodology that should be followed. Funders are represented by people – grant and trust administrators, for example, and will always respond to an application or fundraising query more positively if you have already built up a relationship of trust with them. When making first contact, or asking for application forms, the request should be placed inside a broader query that allows a relationship to be established ('Do you think you would be likely to fund my idea?....please can I have an application form?....what's the deadline? Can I send you a draft to read?').

Once you have the name of a primary contact and have had an exploratory conversation with them, all subsequent dealings will be much easier. Always tell them when they will next hear from you – 'can I ring next week if I have any questions? ...I'll send my form to you next week – it should arrive Thursday or Friday' – be specific – then they will look out for your call or paperwork.

1.7 Evidence: Your 'fundraising fact bank'.

Your personal fundraising strategy should be based on Quality and Track record – and you need to gather high quality documentation and strong evaluation materials in support of this - For example:

- Your website and/or blog – and any directory sites you are listed on
- Catalogues, postcards, fliers, invitations - proof of past activity
- Press cuttings
- Strong visual documentation of your work.
- Letters of support/testimonials.
- Facts and figures that back up your funding 'case'.
- A list of past funding applications.
- An up to date CV
- A business or career plan
- Evaluations

If a fact bank is established, and relevant material written up or scanned into a fundraising folder, it is much easier to write applications drawing on a selection of material that has been collected and edited for this purpose.

Other evidence that would be useful:

- A list of achievements should be prepared - all the successes up to this point.
- You should purchase a good quality digital camera and document everything thoroughly, or if you can afford it, commission a photographer to get the best possible shots of your work, views of exhibitions etc.
- Make the most of opportunities to gather evidence from others who have been involved with your projects over the years – and search your personal archives for good stuff – people like to see evidence of development. This process also allows you to see how far you have come.
- Actively seek letters of support and testimonials from satisfied customers, gallery owners, and the like.

2.0 Part Two: Developing an Action Plan

2.1 Work/Delivery Plan:

You need to describe how your project will unfold in detail, with clear objectives and intended outcomes, how you will make it work and what human, financial and physical resources will be required - along with timescales and deadlines, detailing exactly what happens and when.

Set this out as a three-stage process – short, medium and long term. Clear start and end dates must be set for each part of the work, with milestones for the research, development, planning, resourcing and delivery stages of each strand, as appropriate. You will need to explain how you will measure success – funders will ask how you intend to evaluate what you do.

2.2 Costings:

An overview of your total funding requirements must be produced – budgets of income and expenditure, broken down into headings or ‘cost centres’ (budgets for each activity stream).

In order to help funders make decisions about what they will or will not support, accurate costings for each part of the project need to be produced.

These costings need to take in to account the cost of the human, physical and financial costs of delivery including a share of the overall costs of managing and running the project. Some funders may wish to support only deliverables, others may consider funding both management and delivery costs – as long as they are accurately estimated.

These budgets and costings need to be available for examination – they are a vital component of your fundraising strategy.

2.3 Who will fund?

Now that the aims and objectives of each stream of activity, details of delivery, desired outcomes and qualitative measures have been defined, it should be easier to select the right stakeholders/funders to support each strand of activity.

2.4 Research:

As identified in the initial section of this document, research must now be undertaken to identify the most appropriate **types** of funding source.

For example:

Crafts Council; Arts Council; Local Authorities; Trusts and Foundations; income and sponsorship from Business; income from sales; In-kind giving and income from training or consultancy services.

2.5 Partners:

Ensure that potential partners are clearly identified. There may be several aspects to this:

- Sector partners with shared enthusiasm for your goals – with shared aims and complementary workstreams – galleries, publications, online media?
- Partners in delivery – who might co-deliver certain aspects of the project, or who can help support your aims in other ways.
- Funding Partners

It may be that certain activities will attract the attention of more than one potential funding partner – in which case a dialogue needs to take place in order to clarify who wants to fund which outcomes.

2.6 Cultivation:

This basically means talking with both existing and potential partners to develop the working relationship, providing them with contextual information, and giving them the chance to explore and discuss the overall programme of work, aims, objectives and activity streams. This will enable funders to satisfy themselves that their objectives and your objectives match closely enough for support to be considered appropriate.

Timing the 'ask':

This process of scoping out funders, providing them with information and nurturing the relationship is vital in selecting the right sources of funds for each strand and in establishing the timing of the 'ask'. Applications may only be accepted at certain times of year, or need to be prepared to deadline, or indeed a funder may indicate a willingness to support that is conditional on certain aspects of the programme being successfully piloted or proven.

Professional fundraisers often extend this process of cultivation over a number of years – and indeed you may already have pre-existing relationships that simply need nurturing for a while prior to asking for support.

The shortlist of funders therefore needs to be arranged in priority – who will be approached immediately, who might be short or medium term prospects, and who may be potential partners in the long term, but also - who will need further cultivation for an approach some time in the future.

2.7 Evidence:

They may ask you to back up your case with additional written material at this stage – which is why clear budgets, costings and delivery plans are so important.

Other forms of evidence may be required, and what you need to supply can vary from funder to funder. If they don't ask for supplementary evidence – ring and check – some funders won't look at any extra material that you send. See section 1.7, and Appendix A – Fact bank.

2.8 Making written applications:

Some applications will be made on pre-structured forms – for example, Grants for the Arts and some Trusts and Foundations. Other funders will ask for free-form applications. In both cases, the information required will be pretty much the same, and should highlight the same 'winning' factors.

The Management Centre, architects of The National Arts Fundraising School, identify several key points where applications can be strengthened to increase the chance of success, namely:

- Ensuring that applications are a 100% match for the funder's aims and objectives – in this case your objectives must be clearly within the funder's remit.
- That the application clearly identifies a problem that needs to be solved, and then sets out a solution that is achievable and appropriate. If it moves your work forward strategically, so much the better
- That any opportunity to add value to the application by highlighting how the work will benefit the sector or sector practitioners in the long term –

by disseminating outcomes and sharing good practice – should be clearly stated. You might produce a publication, make input into a seminar or conference, set up a website or blog – all these things add value and could prove decisive. But don't offer to do these things unless they really are important to your project.

2.8.1 Applications Stages – checklist:

The following is a basic checklist if the stages of creating and submitting an application. The calls to the funder should not be missed out – they are a vital part of the process.

- ❑ Phone call to establish contact with potential funder
- ❑ Use this call to check out the funder's level of interest in You
- ❑ Check deadlines and mode of application (application form, free-form proposal, or elements of both?)
- ❑ Application pack requested
- ❑ Application pack received
- ❑ Guidelines read
- ❑ Further phone call to funder to answer queries – this is part of the process of relationship building, and refining of the bid. Application form or proposal completed
- ❑ Supporting information collated
- ❑ Copies of application and supporting information filed at the office
- ❑ Call to funder indicating delivery date of the bid
- ❑ Post or deliver application
- ❑ Call a few days later to confirm receipt

If the application is unsuccessful, call the funder. Ask for feedback. Ask if the bid can be refined and resubmitted. At this point, a wise applicant will thank the funder for their time and effort in considering the bid – you never know when you might need to approach them again.

Appendix A:

Fact-bank – useful for Fundraising and Publicity:

Spend time on gathering the materials you will require to get your message across and keep all these facts and figures together in one place. Then when you have an application to make, all of your resources and text will be easy to access and assemble:

Things to Collect:

Item:	Yes/No	Who can supply this?
A business or career plan		
Information about your website or blog		
Information about any directory sites you are listed on (e.g. Axis, CGS, etsy.com)		
Catalogues, postcards, fliers, invitations - proof of past activity		
Facts and figures that back up your funding 'case'.		
A list of past funding applications.		
An up to date CV		
Press cuttings		
Strong visual documentation of your work.		
Photos		
Letters of support/Quotable quotes		

What other information can you think of that can be collected and used in this way?

Appendix B: Applications Structure - key points

1. Structure:

1. Introduction
2. Summary
3. Problem Statement (e.g. what's the gap you are trying to fill, shortfall in funds you need to complete a project, the aesthetic, philosophical or social objective you want to realise?)
4. Programme and methods (How will you do it?)
5. Evaluation – how will you collect evidence?
6. Future Funding –are you likely to want to come back for more?
7. Budgets – and cashflow forecast if required.

These headings are unpacked as follows:

1. Introduction:

Describe yourself:

- Who you are
- What you do – aims and objectives
- When you started doing what you do
- Why you do what you do
- Track Record
- Current funding/income position
- What your business structure is: sole trader, partnership, company?

2. Summary

- Who is applying?
- For how much?
- To do what?
- Where and with whom?
- In what way?

Why summarise? Applications are not always read in full by decision makers – often they are read by an someone at officer level, who then compiles a summary upon which the decision makers base their decisions. If you supply a good summary, it can help ensure that the right information is put in front of the panel.

3. Problem Statement

- What's the problem?
- What evidence supports this – is it driven by a real need?
- Is it urgent and concrete – i.e. does this have to happen right now?
- Is it a solvable problem – can you really make a difference?
- Will there be legacies - things you can share – documents, publications, and material on the web that will be of broader use to the sector? (Added value)

4. Programme and Methods

A clear workplan that shows:

- How you will address this problem
- Who will do what, with whom, by when
- Specific objectives, milestones and targets
- What resources you will need to run the project.
- What the outcome(s) will be

5. Evaluation

- Show that evaluation is embedded in the plan
- That it happens throughout, not just at the end
- That you will collect useful qualitative and quantitative evidence
- How will you report back, present this evidence?

6. Budgets

- Clear projections of Income and Expenditure
- Budget must balance – Income and Expenditure must relate clearly to each other
- Information must be clear and easy to read – and the funder must be able to understand how much is required, and what part of your idea or project it will pay for.

Useful Funding web links:

<http://www.artquest.org.uk/money/funding/design-crafts.htm>

http://www.craftscouncil.org.uk/craft-directory/opportunities/list/?type_guid%5B%5D=16

<http://www.amazon.co.uk/Arts-Funding-Guide-Anne-Marie-Doulton/dp/1903991102>

<http://www.culture.gov.uk/images/publications/GuidetoArtsFundinginEngland.pdf>

<http://www.dsc.org.uk/Publications/Fundraisingwebsites>

<http://www.funderfinder.org.uk/>

<http://www.acf.org.uk/trustsandfoundations/?id=74>

<http://www.artscouncil.org.uk>

<http://www.designtrust.co.uk>