

# FUNDING WORKBOOK

# Getting started

This workbook is designed to help you package an activity or idea into a project so that it can be used for an application to a funder. Working through the steps should allow you to create a detailed and honest picture of the activities you deliver and identify why those activities are needed. It's about getting the passion for your cause over to the funder in a clear and simple way. This could be the reframing of existing work into a project or the creation of a whole new service.

We have created this workbook as a summary of the advice we give on a regular basis. By the end of it, you will be aware of a range of tools which will create meaningful text, specific to your organisation to be used for a variety of applications.

## **Why do I need to write it as a project, can't I just get running costs funded?**

Project funding is preferred because it's more efficient to fund, here are some of the reasons why:

- It's easier to measure the impact and see if the outcomes have been met.
- Projects are time limited and the funding is therefore not being placed with one organisation for long periods of time meaning more organisations get a chance to have their work supported.
- Projects are more focused, the money goes to the problem / issue / need rather than the organisation.
- It's easier to justify public / donor's money on helping a particular cause or group than funding rent / wages / refreshments with no real clear purpose.

Before you start this journey, know that it doesn't happen overnight, it's about practice and experience. If you are working on this for the first time, it may seem overwhelming but if you know what you want to do and if you are already doing the work, you know all about it. The challenge is telling other people about it. Give yourself some proper time to look at it and work with other people that know the project too if you can. Also, know that you can seek support and you are not alone in the process. Get other people to read it and make sure that people who have no idea what you doing are able to understand it. Remember, WVA can help with this process.

Consider that the funding panel making the decisions don't know you and don't know what lovely people you are; how amazing your volunteers are; how great the people you work with are and they can't be sold on everyone simply being 'awesome'.

You have to sell them your idea, some strong outcomes of the project and the impact it has on everyone involved.

# Section One

This section is thinking about who you help and how you help them. It's about answering honestly the question 'Does what we're doing meet needs of and/or solve the problems of the people we support?'

## UNDERSTANDING LOCAL NEED

If we didn't have people to work with, we wouldn't need to exist, so everything we do is about the people we work with and what they need to lead more fulfilled lives. Think about who you work with (either at the moment or who you might want to work with if it's a new project) and think about what is going on with them.

It can be argued that it's very easy to make big broad assumptions about a group of people. You would need to be able to back up any claims you are going to make.

So, if we assume that...

- All older people are socially isolated
- All young people are troublemakers
- All people that live in a certain area can't / won't pay for anything

...we are making big statements that we are only guessing at. In order to create an effective service and work with people and make a positive change in their lives, we need to look at the root cause of issues as well as the ones on the surface. Some things that exist you will have to accept that you won't be able to solve but you can make steps towards it.

As an example, Foodbank parcels.

The Foodbank provides 3 days worth of food to a person / family in crisis. The immediate problem is the lack of food the household has, the root cause could be a range of issues from budgeting, debt, employment issues or family breakdown. When a client comes to access the service, the root cause is explored and this works towards improving the life chances of the household. The household is directed towards a range of services that can provide them with support to help work towards reducing their issues.

There are also questions about sustainability both of the project and the household's reliance on the service. The household must be seen to be participating in the services to support the root cause of the issue in order to continue to receive the parcels. This is about reducing client dependency and the possibility of issues never being solved. The project itself would be unsustainable if it were to be simply providing free food for many households on a regular basis.

# Section One (cont.)

## How do I find out what issues our service users have?

For this you will have to do some research and consultation. In order to know that your project is fundable and needed, you will need to prove it. There are a few ways of doing this to get started:

- **JSNA (Joint Strategic Needs Assessment)** – this is a range of documents that look at the factors affecting health and wellbeing in Warrington. This can be found via the Warrington Borough Council website.
- **Office for National Statistics** can give you a national benchmark for comparison or to help you identify trends.
- **Partnering with organisations** – working with or gathering information from organisations about what local people are asking for. This could be a range of sources from health, advice, housing and lifestyles. They will be able to inform you on the challenges that people present to them.
- **Surveys / consultation**, simply asking people where their challenges are or what services they need.\*

\* A thing to think about is the difference between WANT and NEED, there will be a lot of things that you can offer that people will want (reduced price or free services, little or no screening / monitoring, no limits on participation etc.) but perhaps don't actually need. There aren't many of us that wouldn't turn down a free meal or a free childcare place! Perhaps the need is the upskilling of people and the impetus to change their behaviours,

You may wish to consider placing a financial value on services which doesn't only make your project more sustainable it also arguably means people respect it more as they have paid for it. You have to cover costs and not just by the volunteers paying for stuff. You should only ever charge what the poorest can afford, always consider how much you can charge for each service (especially if your services use a lot of resources).

Another way to consider your service or your project is as a hook or a tool. As an example, a craft club you deliver is the hook that brings people in, the actual work you are doing is facilitating conversation, signposting, networking and giving people the opportunity to practice making choices in a supported environment. So, if you identify that there is an issue or challenge, consider what hook might be the way of getting people to come and participate in your organisation to help them work on that issue.

You can always check out our resource 'Activity Adjectives' which is a (non exhaustive) list of ways to describe the work / activities you are doing. Try and take a few steps back and look at what you are really doing and who you are as an organisation. Most people that do this exercise don't realise the vast amount of output that they are achieved from one activity. It is this wider impact and activity that will make funders take notice and help you to stand out from other bids. It doesn't have to be about promising the earth either, it's about doing things well, regardless how small. Doing fewer things properly is better than many things terribly.

# Section Two

This is where we start pulling together some wording to begin the project plan / bid. Using the work you did on Section One about understanding what you do, you can then start articulating it.

## RESEARCH SOME FUNDERS

Have a look at the funders' list of criteria, it will generally say what they will and won't fund. If the funder won't fund what you want to do, walk away, DON'T attempt to squash what you do or want to do into someone else's view of the world. For those funding opportunities where you do fit into the criteria, have a look at the questions and have a go at answering them.

Generally the questions are to get a good overview of the project and the people it supports so that the funding panel can decide if they want to put money towards it. It, therefore, gives you a good opportunity to think about how you might want to form the project or how to frame any existing work. If you have a go at answering these questions, it will encourage you to think about the different elements.

You can always try our 'Sample Questions', they are based on questions asked by funders that encourages you to think about the approach you might want to take. You can have a go at answering them and from those answers you can either copy and paste them into an application form if they fit the question or use them to form a project plan (depending on what you are applying for).

## SOME HINTS AND TIPS

Read the full application form first – bullet point comments in all the questions to make sure you have the points in the right place allowing you to then expand on them.

Try to explain things simply, don't use twenty words when ten would do. Get to the point quickly, panels have a lot of applications to read if they have to decipher what you are talking about there is a strong chance they will be put off.

Use language that works outside the sector / organisation / context. Try not to use acronyms or technical speak, a lot of panel members aren't from the voluntary sector and you need them to understand you. The easier you can make it to read the more success it will have.

Pay attention to word count (if there is one) it shows where they place the value. The word count is there for a reason, it tells you to what depth they want you to explain what you are doing or who you are.

Make sure you actually answer the question, don't just put filler in or stuff you might want to add in because you think it will look good. Panel members notice when you haven't answered the question and they can perceive the filler to be that you don't have an answer to the question.

Talk from the heart and be honest but not from a soapbox!

# Section Three

You will now have some written pieces describing what you do, what you want to do, who you work with, who your organisation is etc. It is worth at this stage, before you package it into a project, just to think about anything that might affect the smooth running of the activities.

## FIND THE GAPS

You may think you have covered all bases, but you are very close to the work that you always can't see the flaws or challenges and you may have missed something very obvious (we've all done it!). Take some time analysing your activities to see if there are any potential problems with the idea. Do these problems actually mean it's not the best plan or is it even going to do more harm than good? Lots of well meaning projects start up all the time, but the ones that last are the ones that are a good idea and actually make a difference.

## SWOT / PEST

You may have heard of a SWOT / PEST analysis and we have a template for it. The idea breaks into the following headings and can be thought of in the following ways.

**S – strengths** – what are the good bits about it, what is the difference you know it will make, this could be very small in the grand scheme but huge to an individual

**W – weaknesses** – the things that could go wrong, what if no one turns up, what if everyone turns up, what if it rains, what if no one likes it, what if we run out of teabags?

**O – opportunities** – ways in which the activity or project can grow by helping more people or helping the same people in more ways.

**T – threats** – what could harm the activities? What else is going on in the area that could do the same work with the same people?

**P – political** – what is currently on the political agenda which means that it would be desirable in terms of funding and support? What is also being publicised within the media that would attract people to your service?

**E – economic** – what is there funding for in the area? What can you afford to do? What can people locally pay for? How do you manage the sense of expectation and the sense of entitlement?

**S – social** – the people involved and the problems they are having based on the experience and opportunities available to them.

**T – technological** - what equipment / resources (including facilities) do we need to make it happen? Are they hard to find? Do they cost a lot of money? Are they specialist?

# Section Four

At last, you can do the fun bit of packaging all your ideas together into a project! This section is about putting the final polish on the idea before you write it up into the bid. You can use our 'Project Plan' matrix to help. The following are some things to think about.

**PROJECT NAME** – Give your project a catchy and memorable name, this means it's easy to refer to by users, funders, other agencies and your team. Having a strong title gives everyone involved a sense of identity and belonging. Do some research into what other organisations have called their projects and see if anything inspires you, don't steal their name though!

**STRONG TARGETS** – Create some strong SMART (specific, measurable, actionable, relevant, time bound) targets for your project which will be used all the way through it to make decisions and inspire services and activities. Then at the end within the monitoring to establish if the project has achieved its goal.

**BUDGET** – Does your itemised budget add up and make sense? Are you asking for anything outlandish? Who is going to look after /maintain and store all the stuff you are needing? Have you put in reasonable figures for staffing or volunteer costs? Have you considered all the elements that need funding?

**SUSTAINABILITY** – In what ways are you going to be funded aside from grant funding? Does your group fundraise? Do people pay a membership? Do you charge for services? Do you trade? It is undesirable for an organisation / project to rely on grant funding alone.

**REALISM** – Have you set out to do something you can deliver? Are you making wild promises? Will you be able to get to the end and say you actually did what you promised you would?

**CLARITY** – Does what you have written make sense? Can someone that has no idea what you do understand this project plan?

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## MEASURING THE IMPACT

One last thing to consider is how are you going to monitor the outcomes? As you go through the project you will gather the material you need to effectively complete a report on how the project went and what the difference was that you made. Some ways in which you could gather feedback:

- User surveys about attitudes or personal perceptions
- Engagement / attendance figures
- Figures from partners (schools, law enforcement, medical professionals etc.)
- Photos / videos / soundbites / voxpops

You could also have case studies as added colour / interest but remember a case study is only ever one individual's journey at a time.

## Written a bid and need another pair of eyes to look over it?

WVA offers a free read-through service where we will read your bid and offer feedback as a critical friend. For more information or to take advantage of this service contact:

**Bryan – [bryan@warringtonva.org.uk](mailto:bryan@warringtonva.org.uk)**

This workbook is suggested activity to help focus thoughts towards completing a funding bid. There is no guarantee that the bid will be successful from following these steps as there are external factors that affect the bid's success.



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