From Bin to Win: Raising More Money From Grants

David Burgess
Apollo Fundraising

museums
Essex

Steel buckles under weight of applications

The Steel Charitable Trust has announced that they will no longer be taking applications for their "United Kingdom Under-26 Fund", due to a persistent high volume of applications.

Speaking exclusively to BBCON News, a spokesperson for the Trust said "Applications to this fund are currently running into several hundreds each quarter, but **budget constraints mean only about 2% can be made an award.** This is unsustainable. Somewhat reluctantly, the Trustees have made the decision – based on considerations of fairness, time and cost-effectiveness for all parties – that, from 2026, applications to this fund will be by invitation only."

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What you THINK it's like:

What it's ACTUALLY like:

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"charities with private, independent and sustainable income that fulfil their purposes by funding or otherwise supporting individuals or other organisations."

Association of Charitable Foundations

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Trusts and Foundations

JERWOOD CHARITABLE FOUNDATION

clore duffield foundation

The Wolfson* Foundation

phf Paul Hamlyn Foundation

wellcometrust

ef Esmée Fairbairn FOUNDATION

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Trusts tend to prefer…

◎ Time-limited projects

◎ Projects with a benefit beyond "art for art's sake"

◎ Innovative work/new approaches – Risky projects?

◎ Transformational projects – legacy

◎ Projects with learning opportunities for other orgs

◎ Projects run by Charities!

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What do Trusts need to know?

- How does this meet our aims?
- What is the need for this work?
- How much money do they need? And when?
- What impact will our gift have? Value for money?
- What are the risks?

Why should we support this over other projects?

What can you do about it?

- Be picky about who you apply to

- Make sure you fully understand the funder's aims

- Be explicit about how your project will help the funder meet those aims

- Quantify the impact their grant will have against those aims

- Use the funder's language…but show you know what it means/how it is relevant to you

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Where to find potential funders

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If I had six hours to chop down a tree, I'd spend the first four hours sharpening the axe.

~ Abraham Lincoln

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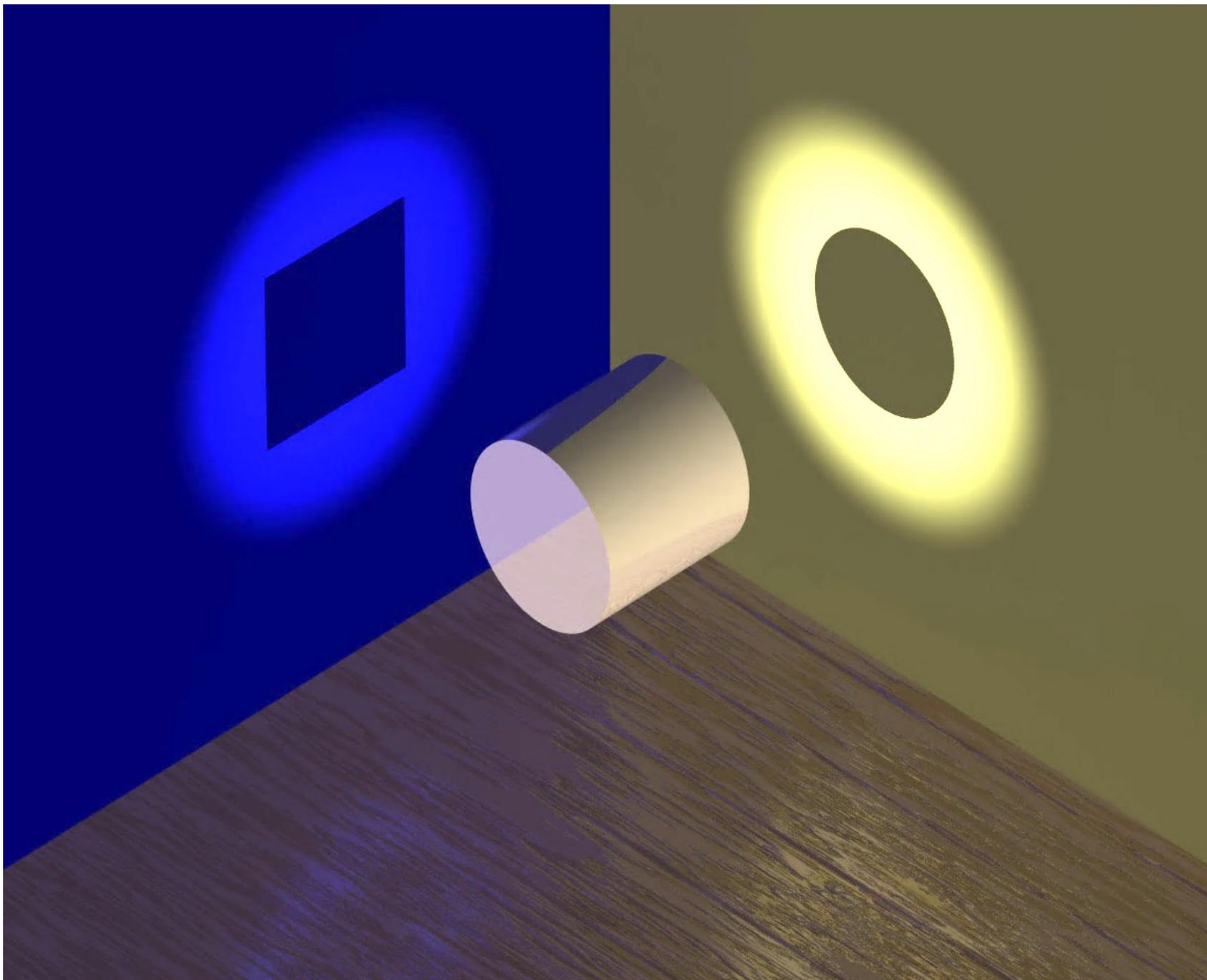
The Muggle Question:

What do I need funding for?

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The Better Question:

Why?

Why?

◉ What NEEDS OR PROBLEMS does this project seek to fix?

◉ Why do these problems need to be addressed NOW?

◉ What are the POSITIVE consequences of delivering this project?

◉ What are the NEGATIVE consequences of NOT delivering this project?

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Preservation of Heritage?

Public Engagement with Heritage?

Physical Health?

Mental Health?

Education?

Your Work

Environmental?

Young people?

Older People?

Community Cohesion?

Regeneration?

Social Welfare?

Supporting specific groups /communities?

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Where to look

◎ Funding Databases (print and online)

◎ Charity Commission website (advanced search)

◎ Supporters Lists

◎ Council newsletters

◎ Sector body newsletters

◎ Own networks

◎ Commissioned research?

Charity Excellence FRAMEWORK

Funds|Online

Get Grants

Grants Online

UKRI UK Research and Innovation

GrantFinder

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The Wolfson* Foundation

Funding   Grant holders   About   News

Building excellence through support for education, science, culture and health

Wolfson Foundation ✔
@wolfsonfdn

Independent charity that awards grants to support & promote excellence across the fields of science, health, education &the arts & humanities. Tweets by Amanda

🔗 wolfson.org.uk   📅 Joined March 2012

1,601 Following   **8,137** Followers

··· Follow
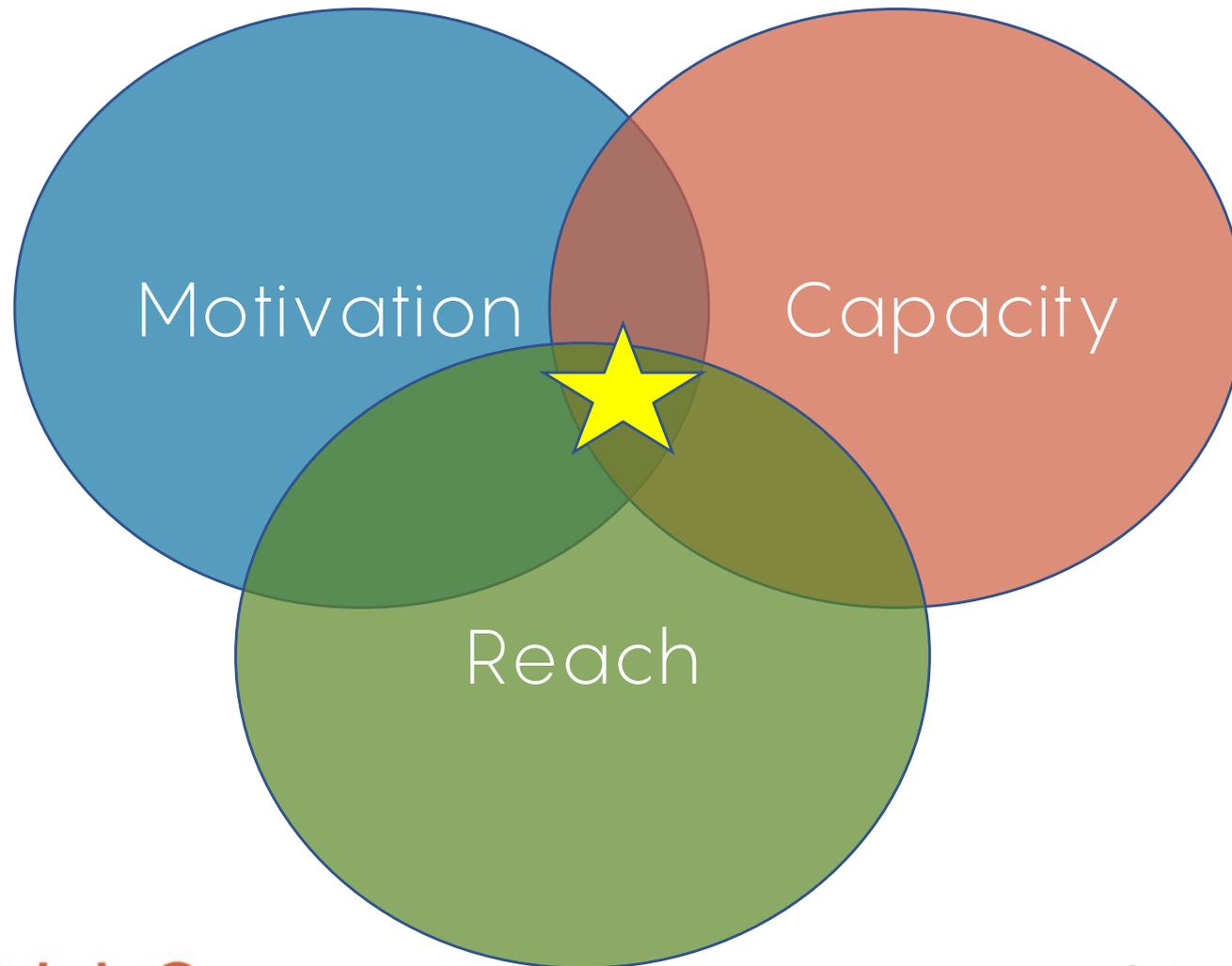
Trust website and social media channels

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THE WOLFSON FOUNDATION

Charity number: 1156077

✅ Charity reporting is up to date (on time)

Charity overview

What, who, how, where

Governance

Trustees

Financial history

Assets and liabilities

Accounts and annual returns

Governing document

Contact information

Activities - how the charity spends its money

The objectives of the Wolfson Foundation are grant-giving. On 4 April 2014, the operational activities and net assets of the Wolfson Foundation (a charitable trust, registered number 206495) passed to the Wolfson Foundation, charity number 1156077 (a charitable company). The accounts for the years ending 5 April 2014 and earlier can be viewed on the charity's website at www.wolfson.org.uk.

Income and expenditure

Data for financial year ending 31 March 2024

Total income:
£25,762,350

Total expenditure:
£46,705,764
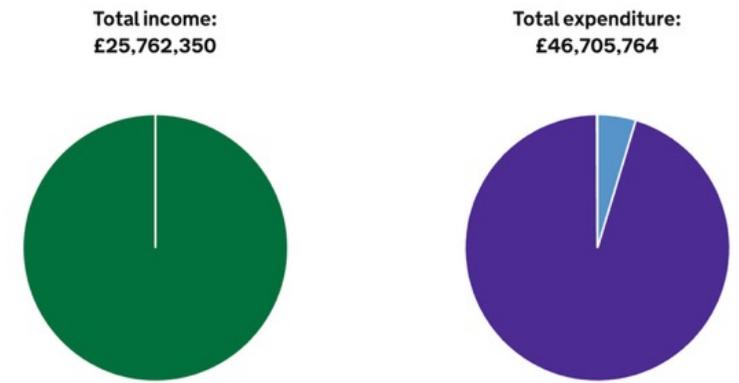
Charity Commission and Annual Accounts

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Annual Accounts — useful bits

- Objectives and Activities for the Public Benefit
- Structure, Governance and Management
- Grant-making process and policy
- Achievements and Performance
- Financial Review
- Plans for the Future
- Expenditure breakdown
- Full grant list
- Related Party Transactions

Motivation

◎ Closeness to stated aims & objectives

◎ Favoured projects — Core? Capital?

◎ Funded similar things?

◎ Signs of flexibility?

◎ Future plans?

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Future Plans

- Change in priorities

- Celebrations or anniversaries

- Change in financial position

- Change in personnel

- Winding down

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What they say v what they do

"We support the advancement of education in culture, heritage and the performing arts"

Culture and Arts
The National Gallery Trust
Gilbert Whites House and the Oates Museum
Watts Gallery
British Institute of Archaeology at Ankara
Faust Chamber Orchestra
Garsington Opera
British Museum Society
Old Vic Theatre Trust
National Portrait Gallery
Stanley Spencer Gallery
The British Museum
The Holburne Museum
Glyndebourne Arts Trust
Glyndebourne Productions
The Art Fund
Windsor Festival Society Limited
Royal Opera House Foundation
Whitechapel Art Gallery

Capacity to Give

◉ Average Grant?

◉ Upper and lower limits?

◉ Characteristics of larger grants?

◉ Amount to new projects?

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Culture and Arts

The National Gallery Trust	10,200	-
Gilbert Whites House and the Oates Museum	10,000	-
Watts Gallery	10,000	-
British Institute of Archaeology at Ankara	5,000	-
Faust Chamber Orchestra	5,000	-
Garsington Opera	5,000	-
British Museum Society	1,500	1,500
Old Vic Theatre Trust	1,500	1,000
National Portrait Gallery	1,250	1,200
Stanley Spencer Gallery	1,250	-
The British Museum	1,000	-
The Holburne Museum	1,000	-
Glyndebourne Arts Trust	170	170
Glyndebourne Productions	-	14,400
The Art Fund	-	11,500
Windsor Festival Society Limited	-	5,000
Royal Opera House Foundation	-	2,173
Whitechapel Art Gallery	-	1,000
Total culture and arts	**52,870**	**50,643**

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In your reach?

◉ Eligibility and exclusions

◉ Timeframes

◉ Rules and Processes

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Applications

Unsolicited applications are not considered.

Exclusions

No grants to individuals or non-registered charities.

Who is involved?

Grant Managers and Administrators

Board and Funding Panel members

Advisors and networks

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You've researched enough when you know...

◉ What project (or part of your project) to apply for

◉ How much to apply for

◉ When to apply

◉ How to submit the best possible application

Where are the gaps in your knowledge?

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How can you fill the gaps?

- Phone/Zoom call
- Email
- Meeting
- "Chance encounter"
- Speak to other people connected with the funder
- Speak to other people who have had funding

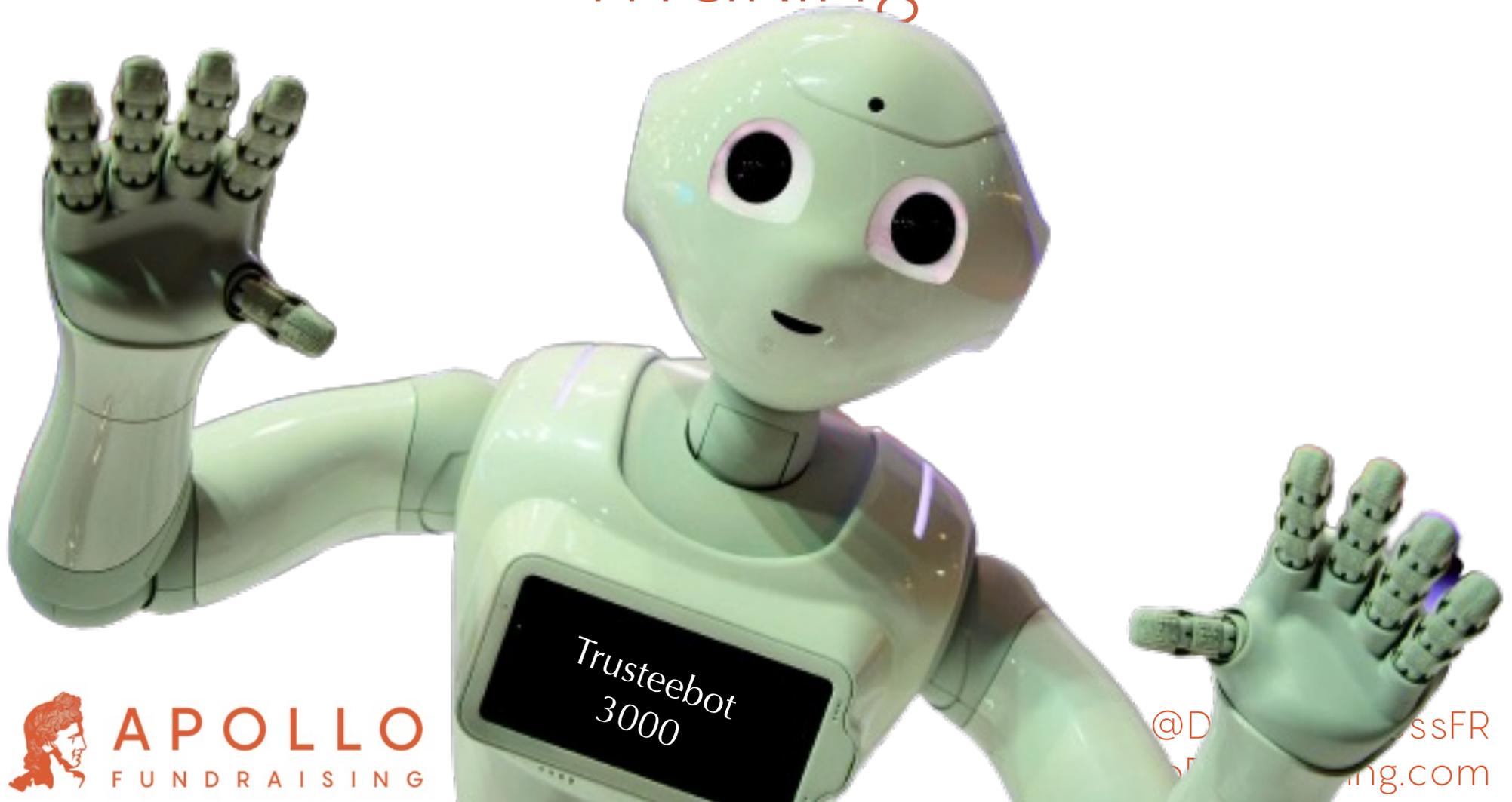# Less reliance on your written proposal to win them over

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Familiarity can help you stand out from the crowd

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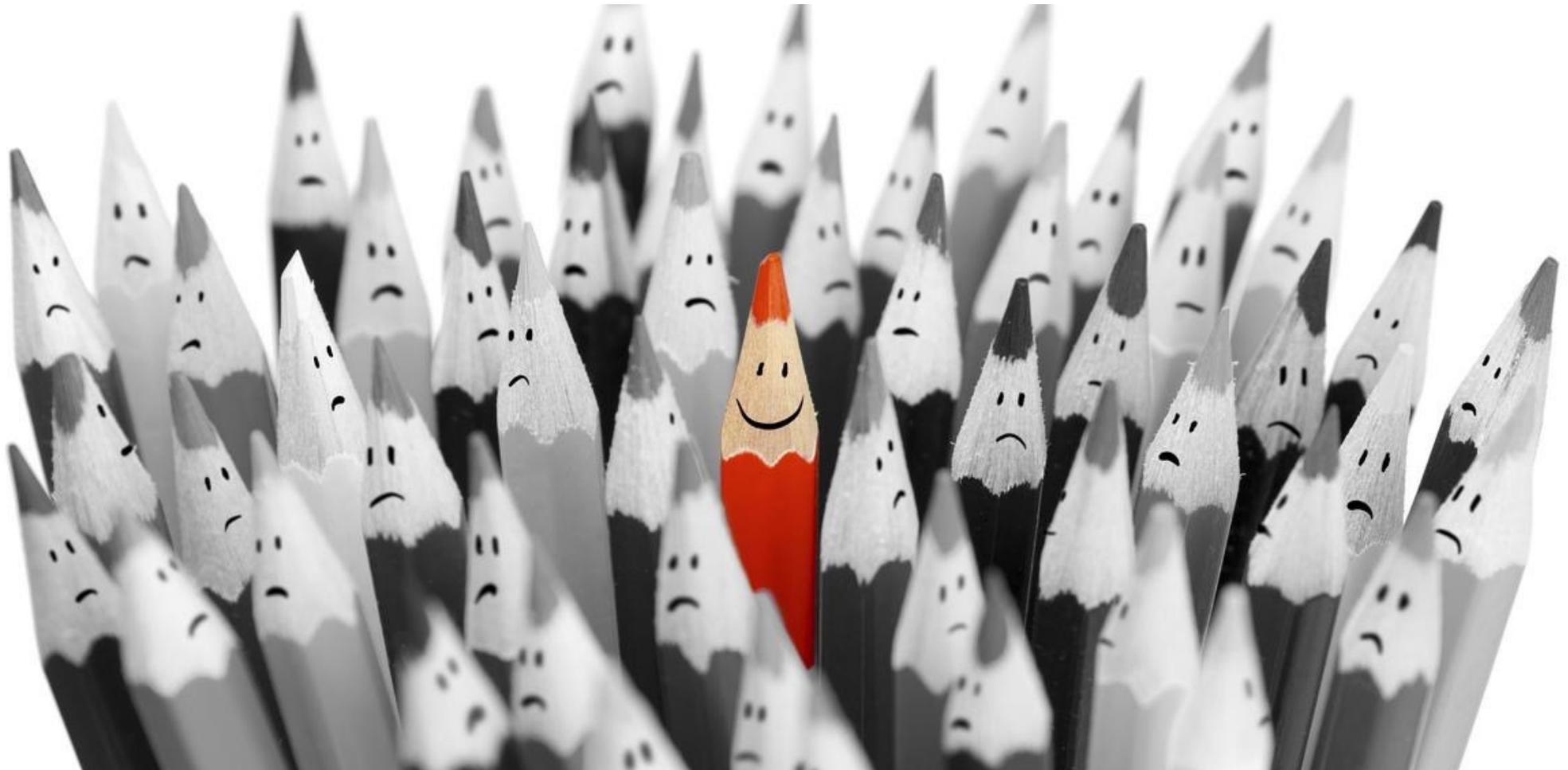
Have an advocate in the room

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Benefit from the human/sub-conscious side of decision making

Trusteebot 3000

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Benefit from flexibility in the rules

Other things you can learn from the relationship

- Any "hidden" aims/priorities?
- Any gaps they are trying to fill?
- Are there biases towards certain types of project?
- Are certain times better than others to apply?
- How do they make decisions on how much to give?
- What information is most important during the decision-making process?
- Any people to specifically appeal to?

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Getting the most from a meeting

- Remind yourself what you need from each activity
- Remind yourself what you already know
- Have options
- Practice!
- Practice answers to difficult questions
- Tell stories
- Ask open questions…and listen to the answers
- Share your passion

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Structuring your Proposal

Section 1 — Summary

Purpose: To control messaging to trustees. To get most important info across when most engaged.

- 2-3 sentences

- Who are you applying to?

- How do you match their aims?

- How much are you asking for?

- What will the funding be used for?

Section 2 — Who are you?

Purpose: To build trust and confidence that you can be trusted

- Brief history of organisation
- Summary of successes
- Anything that demonstrates why you are the right org to deliver this project
- Any other partners involved
- Previous experience of delivering similar projects

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Section 3 — What's the Need?

Purpose: To show the problem that you are trying to address

◎ What is the problem you are seeking to address?

◎ Why does this problem urgently need to be solved?

◎ What evidence do you have about the scale, impact & current trend of the problem?

◎ Who is negatively impacted by the problem?

Section 4 — What are you doing?

Purpose: To show how the work you are proposing will address the problem

◉ What will you deliver to solve the problem?

◉ Paint a picture! Bring it to life!

◉ How will this help?

Section 5 — How will you know if it has worked?

Purpose: To show how you will evaluate the project and share your learning with others

- How will you monitor during the project?
- How will you know if your intervention has worked?
- How will you evaluate your approach?
- How will you share any lessons with the wider sector?

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Section 6 — What comes next?

Purpose: To show you have considered what will happen to project/participants when funding ends

◉ Will the project continue beyond this grant?

◉ If so, how will you pay for it?

◉ If not, what happens to participants?

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Section 7 — What is the current financial position?

Purpose: To explain how this grant fits into the total project budget

- What is the total cost?
- How much has already been raised? From where?
- What is the current shortfall?
- Who else has been approached?
- What are your plans for raising the rest?

Section 8 — Final Ask

Purpose: To link everything back to the Trust and what you are asking them to do

- How much are you asking for?
- What impact will it have?
- How will it fit with the trust's aims?

Proposal Structure Recap

- Summary
- Introduction
- Problem
- Solution
- Evaluation
- Exit Strategy
- Budget
- Final Ask

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So, why do applications fail?

Time is not on your side

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What can you do about it?

◉ Short – only say what you need to say

◉ Short, simple sentences

◉ Top and Tail with key points

◉ Highlight key points with bold text, headings & image captions

◉ Don't rely on attachments or external links

◉ Get your proposal in early!

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Paul Ramsbottom @PaulBRa... · 51m ⌄

Exactly one week today until the @wolfsonfdn funding deadline. The team have a soft spot for those who get their applications in early!

↩   ↻ 3   ♥ 2   ✉

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Deadline = 5pm…

…so what happens to this one?

Re: Application to The Apollo (Sutton) Foundation

From

To   david.burgess@apollofundraising.com <david.burg

Date   2019-06-1 17:01

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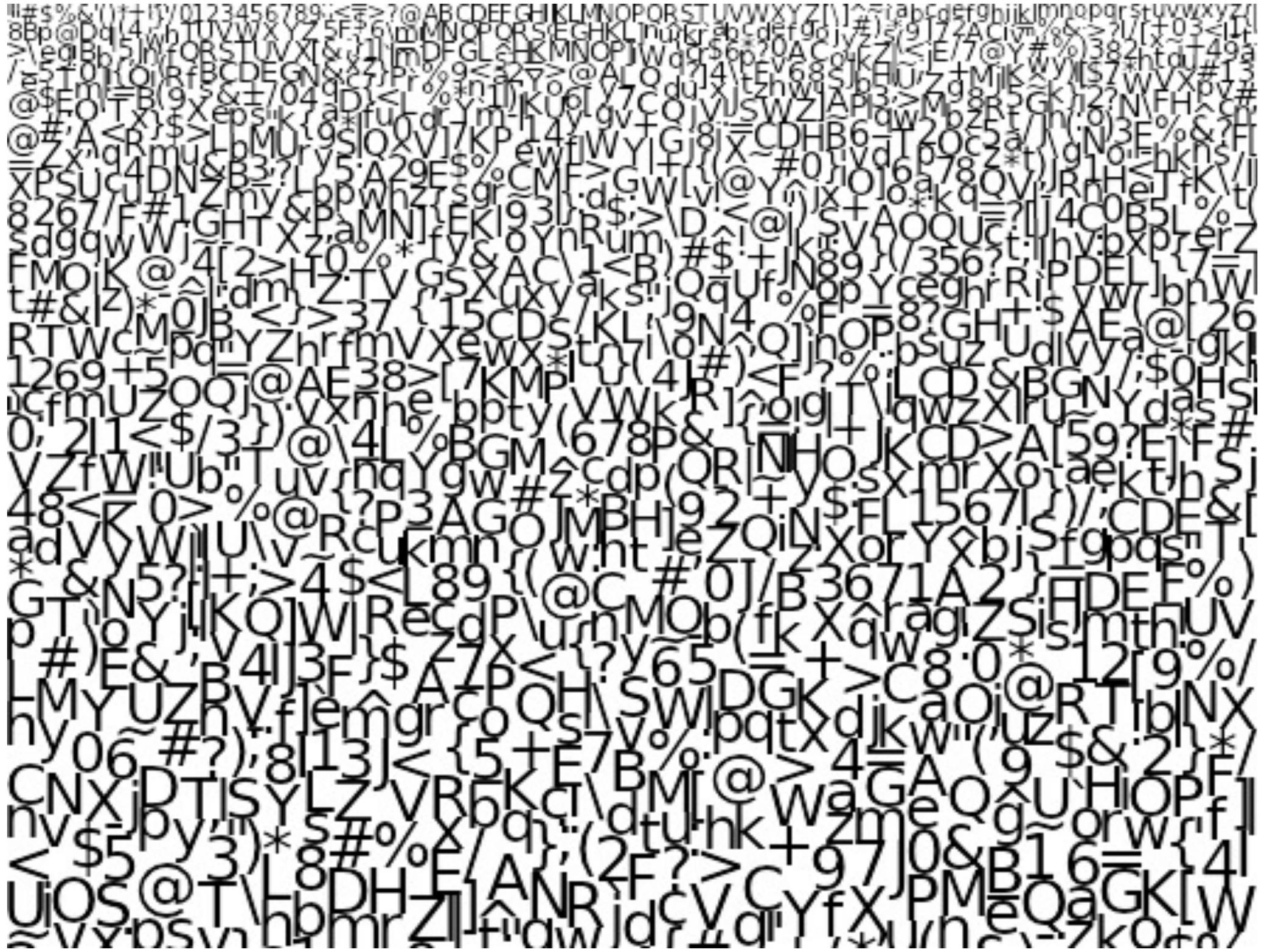
Make it easy to read

◎ Protect the White Space!

◎ Use short sentences and simple language

◎ Use headings, pictures, bullet points

◎ Use left-justified text

The Curse of Knowledge

"Once we know something, we find it hard to imagine what it was like not to know it. Our knowledge has "cursed" us. And it becomes difficult for us to share our knowledge with others, because we can't readily re-create our listeners' state of mind".
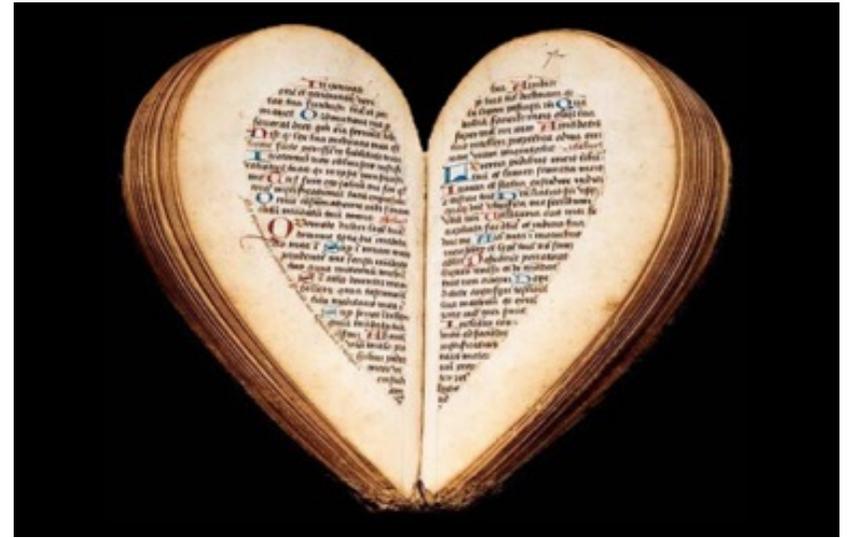
Chip and Dan Heath, Made to Stick

What can you do about it?

- Assume they know nothing — paint them a picture

- Get an "outsider" to review it

- Look for connections with things your reader will know / have experienced

- Avoid jargon – and remember we don't always know what's jargon

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Most applications are painfully boring to read
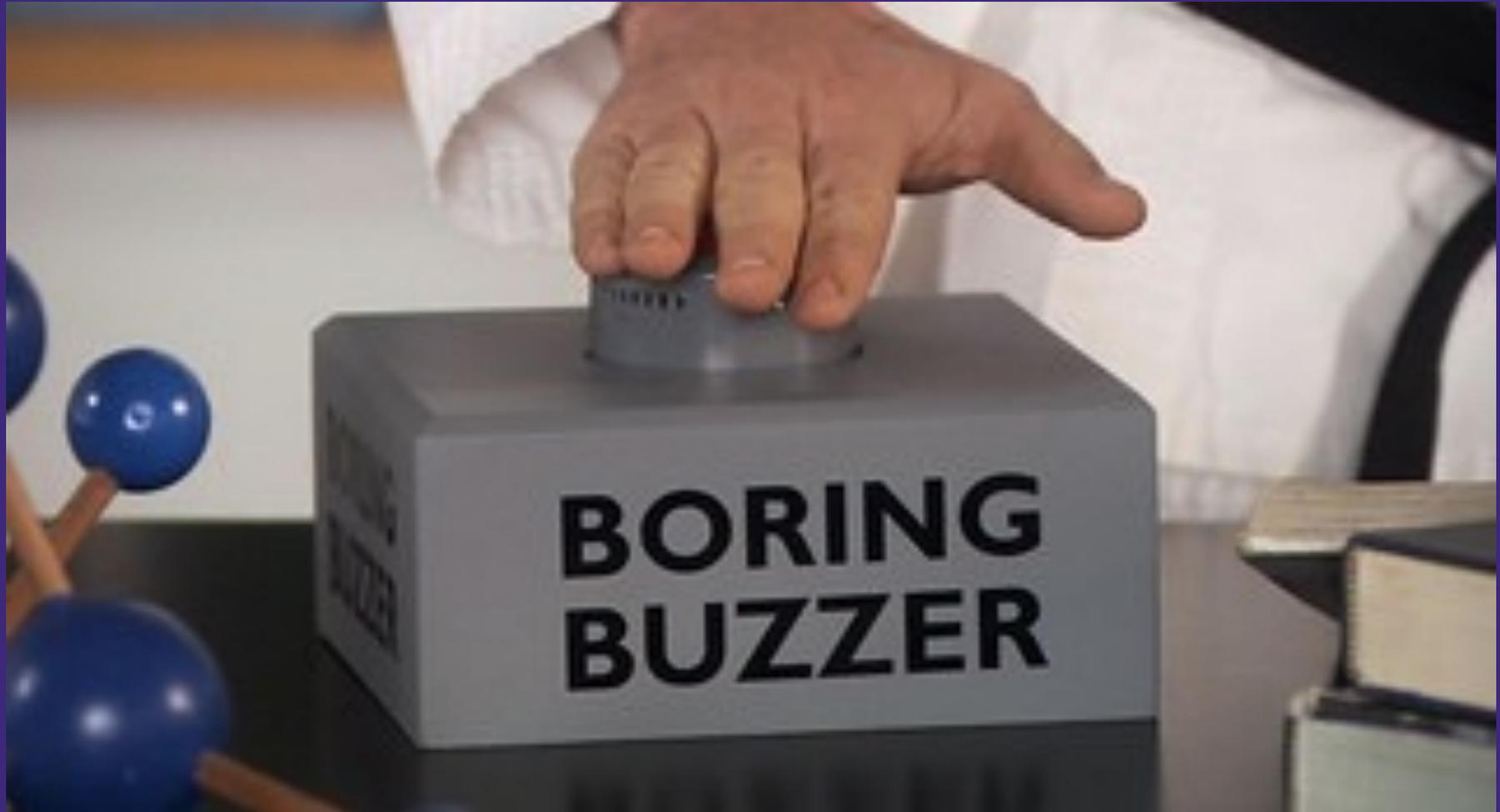
Be Passionate!

Tell Stories!

It was a bright, cold day in April, and the clocks were striking thirteen
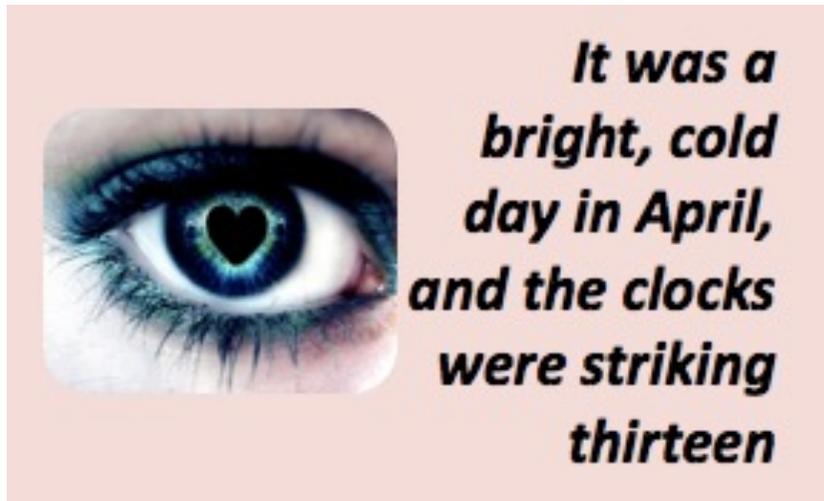
Be Gripping!

Be Different!

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The Apollo (Sutton) Foundation: Hello! To kick things off, please could you tell us a little about your organisation?

Chapter: Certainly! Chapter provides support to people with severe and enduring mental illness in Cheshire West and Chester. Our tailored programme of one-to-ones, group activities, training and voluntary work placements help our service users grow in confidence, improve their mental health, make new friends, and feel hope for the future.

The Apollo (Sutton) Foundation: When you say "severe and enduring", what does that mean?

Chapter: It's an NHS-based term which refers to any diagnosis with very life-limiting symptoms and which lasts a long time, if not a person's whole life. Diagnoses include bipolar disorder, schizophrenia, personality disorder, psychosis, eating disorder and self-harm. To explain the effects of such an illness, here's Lucy!

Hi, I'm Lucy and I have bipolar disorder. My thoughts race, I have trouble sleeping and I sometimes behave erratically, including making bad financial decisions and spending myself into debt, which causes anxiety. My medication helps a bit, but it also makes me forgetful and jittery, which can make me worried about going out in public. I was very low when I got involved with Chapter.

Chapter: Thanks Lucy. Joining Chapter has really worked for Lucy. She's grown in confidence to the point where she is not only able to leave her house every day... She is now delivering some arts and crafts classes herself!

The Apollo (Sutton) Foundation: I see... How many people like Lucy are there?

Chapter: Estimates vary, but something like 1 in 100 have a severe mental illness. That would mean that in Cheshire West and Chester – where we work – there are more than 2,000 working age people with such a diagnosis. We know there's a real need for our work because for the first time in our 25 year history, we have a waiting list.

The Apollo (Sutton) Foundation: Thanks. Can you tell us about your group activities?

Chapter: We run 5-6 different activities every week which offer our service users the opportunity to meet new people, learn new skills and get out into the community. Activities include countryside walks, board games, cooking, photography and many more. In 2019, we have held 116 sessions, engaging 64 different people. Your £500 grant will go towards materials and room hire for these activities.

For more about how our activities help, here's Joe.

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Through a Funder's Eyes

The Interactive Grant-Making Experience for Fundraisers
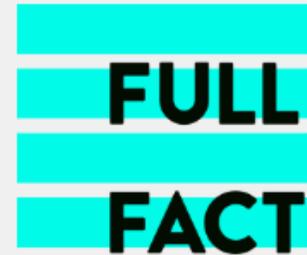
Want to see what it's really like on the other side of the grant-giving process?

Our interactive grant-making workshop helps you to see your funding proposals in a completely new light. Find out more at

FundersEyes.com

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