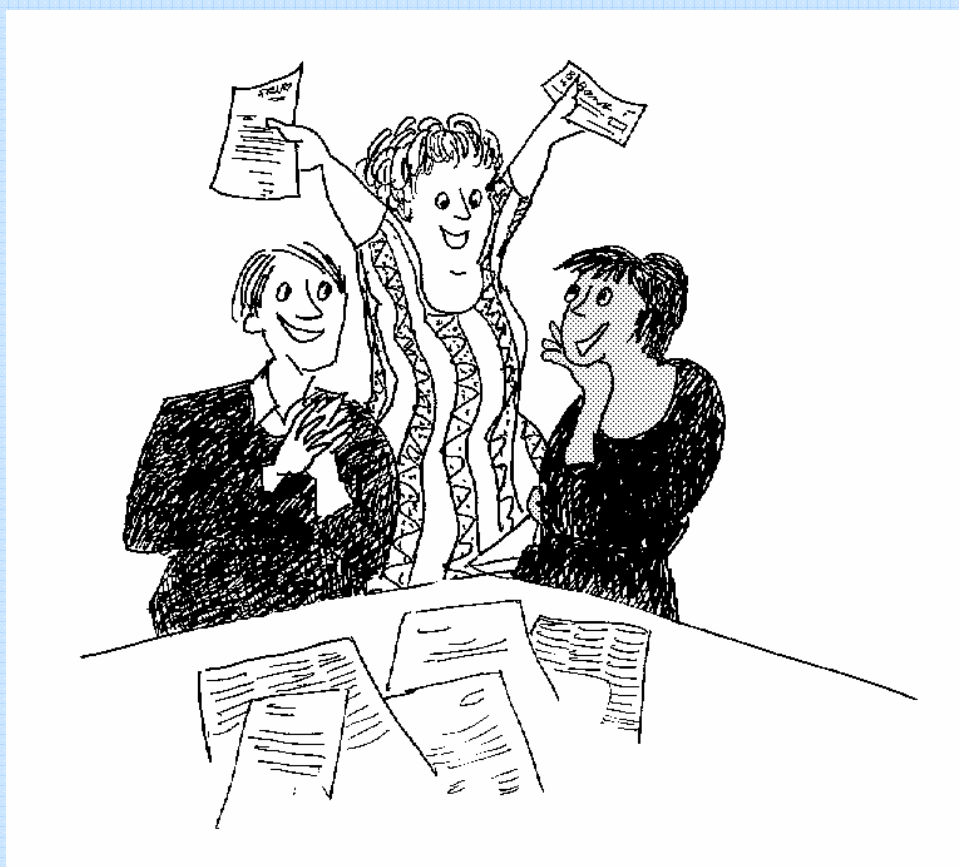


# How to Raise Funds

## A Guide for Scottish Voluntary Organisations

2006 edition



**Pam Judson**



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## Foreword

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Welcome to SCVO's new Guide to Fundraising, produced specifically for small and medium sized organisations working in Scotland

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When I first started updating this publication, I thought it would mostly involve making changes of address and contacts; maybe adding a few new funders and their criteria, and perhaps examining one or two new shifts in how the voluntary sector deals with fundraising. On reading what I had written 6 years ago I have realised that there have been some major shifts in the fundraising climate during that time and that these changes have significantly affected how charities go about securing resources.

Perhaps the most substantial development in Scotland has been the setting up of Scottish charitable law legislation and the creation of OSCR – The Office of the Scottish Charity Regulator. Most organisations have regarded this event as long overdue and there has been much anticipation surrounding the details and how this affects everything from investment and governance to fundraising. Although this has caused some anxiety - particularly from smaller organisations fearful about too much red tape, regulation and compliance issues, I feel that the vast majority of the new legislation will not only benefit smaller groups but also strengthen the voluntary sector as a whole. I think it has raised the profile of how charities work, what kind of work they do and will hopefully increase the confidence of the general public when donating and supporting the work we do.

The highlighting of Governance issues (the roles and responsibilities of charitable management committees and trustees, and the relationships they have with staff and volunteers) has been a significant piece of this legislation. This will hopefully guide groups to focus on the importance of developing their boards as well as their practices. In addition, the establishment of self-regulation of fundraising practices and enhancement of codes of practice by the Institute of Fundraising will give organisations a better framework to work with when developing fundraising practice.

There have been some other significant developments. One of these is the reorganisation of the Lottery Boards. Guidelines and information are now much clearer and more accessible, assessments more transparent. The short form pre-application is a welcome addition for smaller organisations that often struggle with the jargon and have fewer resources and time. The popularity of Awards for All has resulted in an increase of the grant size (up to £10,000) and this source of funding will continue to be significant in the development of smaller organisations.

Another development has been the increasing importance of service level agreements and the rise in pressure for organisations to participate in the contracting out culture.

This development, in my opinion, is a mixed blessing. On the positive side it has enabled some (particularly the larger more established) organisations to secure steady and more predictable income. They have gained skills and expertise and been able to increase the scope of work, benefiting more people. However a side effect has been to blur the line between statutory obligations and the role of the voluntary sector. This has led to an ongoing debate about who is ultimately responsible for delivering essential services. I have witnessed a number of local authorities that are quite happy to put this responsibility onto voluntary organisations to both the detriment of the service users and the voluntary group involved. In the main, smaller organisations do not yet have the skills and resources to enter into this area successfully yet there is pressure to do so in the name of becoming 'less grant dependant'. This is an area that I believe will continue to present dilemmas for service delivery organisations, with no easy answers at hand.

Along side of this change of culture from local authorities and other funders is an equally strong push for charities to develop other earned income sources. There are a number of new grant and loan opportunities that have been created to encourage organisations to start down the path of earning money. There are many exciting developments in this area particularly in the growing Social Enterprise and social economy area. While I admire these organisations' creativity and drive, (there are many successful examples), many of the small and medium sized charities have come to feel unduly pressured to enter into this arena, often without the capacity and expertise to succeed. If this is to be a significant area of income to the voluntary sector in the future (and there are signs that it will be) then more resources will need to be made available to ensure both staff and trustees are able to rise to the challenges offered in the area of business, marketing and sales skills.

Several individuals who have recently made large charitable contributions to the voluntary sector have boosted the profile of individual philanthropy in the UK and specifically Scotland. They have included people such as Irving Laidlaw, Tom Farmer, Ann Gloag, Brian Souter and JK Rowling. It is yet unclear how their high profile presence in the press and promotion of 'giving' will affect the general attitudes about philanthropy long term, but the increasing promotion and use of tax effective measures like gift aid and payroll giving are beginning to impact on even the smallest voluntary organisations. Reaching more young people and developing a stronger culture of philanthropy will certainly be crucial in the future for many organisations with aging members and constituencies. Building on a stronger public model of philanthropy and promoting models of giving can only be helpful.

Finally, there has been growth in the area of what is being called 'new media' fundraising. This encompasses not just email, websites and various techniques in on-line fundraising, (which were already in use when I wrote this guide in 2000) but also the exploration of text and instant messaging, pod casting, downloading music and speech programming and interactive TV as a fundraising medium. These new avenues were used effectively during the Tsunami Appeals and by a number of overseas development charities in the past year. In addition, organisations are now exploring how they can promote volunteering, raise the profile of the organisation and engage the public, particularly youth, through these new methods. At the moment this area of activity is still

mainly the preserve of large organisations that can afford to experiment and invest in new technology. However the possibilities are quite significant for all groups in the future as the cost of these new endeavours comes down and more of us have access to the technology. In this new edition of the guide I will explore some of these new developments in more detail as well as signpost readers to resources that will help you to understand the impact they may have on your organisation.







# Introduction

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This publication is intended to help set organisations on the path to fundraising effectiveness.

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It takes account of the fact that most small to medium-sized organisations do not employ dedicated fundraisers and that fundraising is usually carried out by volunteers and management committee members as well as paid staff. If your organisation has a dedicated fundraiser, I hope to make it clear in this guide that this activity should not be a solo responsibility – there are tasks that the whole organisation needs to be involved with in order to raise resources and contribute to the fundraising process.

In the present climate of increasing numbers of voluntary organisations and the perception of increased competition for limited funds, many groups feel overwhelmed and frustrated by the looming spectre of finding money and support. Where do you begin? Who has money? How do you approach them? If funding is secured, how can you ensure that it will continue in the future and how can you make your income more sustainable? This publication will address these issues and hopefully demystify the process so that you can get on with your core mission - your work!

I have written this publication with Scottish voluntary organisations in mind. To this end, there are examples of funders that have a specific interest in Scotland and some of the advice is more relevant to the problems facing Scottish based groups. I have included information on the make up and funding of the voluntary sector in Scotland which may be helpful for understanding how you fit into the big picture. The general underlying principles of fundraising discussed here however are applicable to most UK-based groups and can be used by any voluntary organisation.

Up to date and accurate information about funders and their guidelines is key to submitting effective proposals. Where possible, I have included website links and sources of information which are updated regularly. I have also highlighted a variety of organisations which can support your fundraising efforts and provide further inspiration. There is no point in reinventing the wheel! If you hear about a new way of raising funds or come across an idea that has worked for someone else, use it.

I am often asked in my fundraising work to come up with the 'magic' paragraph or approach that funders will respond to positively. After over 20 years of fundraising, I have yet to find the one method or technique that will succeed with all funders in all situations. I have attempted to outline a variety of strategies and options that have worked for me and other fundraisers in the past. You need to test them out for yourself. There is no one formula for success. It is important to remember that each funder (and

voluntary organisation) is unique. What may work for one funder may not be appropriate for another. One universal principle does hold true, however - the key to effective fundraising is research and preparation. Follow the 80 / 20 rule - put 80% of your effort into research and preparation, 20% on asking and proposals - this will help you be effective in any approach you make.

## How to Use This Guide

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This publication is divided into several chapters. The first chapter explores fundraising myths and truths. The second chapter looks at what you need to have in place before you can fundraise effectively. This includes some general principles about fundraising and how funders think, as well as a section on planning with worksheets and checklists for you to refer to when writing your proposals. The third chapter looks at writing effective proposals and includes an outline of a proposal. The following chapters focus on information on specific sources of funding, research tips, bringing it all together and what to do when you get the money. The appendix gives details of useful organisations and other resources, including websites to investigate.

It is outside the scope of this publication to give detailed information on how the law affects fundraising (e.g. public charitable collections, Data Protection, lotteries). There has been a major change in the regulatory landscape in Scotland as of 2006 in that Scotland now has its own charitable law and has a newly formed regulator -The Office of the Scottish Charity Regulator (OSCR). Readers are encouraged to seek advice from OSCR and other appropriate organisations and publications listed in the appendix to ensure they stay within the law when fundraising. In addition, the Institute of Fundraising has produced a series of codes of practice covering many areas of fundraising. These codes can be accessed through the Institute website at:  
**[www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)**

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## CHAPTER 1

# Fundraising Myths and Truths







## Chapter 1

# Fundraising Myths and Truths

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### FUNDRAISING MYTHS

Every occupation has its share of myths and folklore. Fundraising is no exception. The following are common myths I have come across about fundraising in the voluntary sector. Like every myth, there is usually a grain of truth, but bear in mind that this is not the whole story.

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#### **1. Only large organisations with professional fundraisers get the money**

Larger organisations do have an in-built advantage in that they can call on more resources and personnel. However, specialist advice is becoming more accessible to smaller groups through networking, local Councils for Voluntary Service (CVSs) and secondments from the business sector. Find out who these contacts are and take advantage of them. Start in your local area with your local authority. Most local authorities have grant programmes and a designated officer to contact regarding support of the voluntary sector. This expertise is usually free and set up to serve the needs of less well resourced groups.

A number of funders have now recognised the need for grants that enable organisations to access training, consultancy and other forms of capacity building (examples include the Charities Aid Foundation and Lloyds TSB Foundation for Scotland - see appendix). In addition, many funders have recognised that small and medium sized organisations have important services and vital roles to play. There are a growing number of 'fast track' grants available specifically for smaller organisations (e.g. 'Awards for All', the small grants scheme from the National Lottery Distributors –, as well as a small grant Scheme from the Scottish Community Foundation see Chapter 4). These schemes recognise that small and medium sized organisations often have the advantage of being closer to the individuals and causes that they work with and can provide vital services with relatively small grants. They have less paper work to complete and provide good 'starter' funds for new and less experienced organisations as well as small project funding and capital funds for more established groups.

Many voluntary groups do not take full account of their local network. In addition to the larger 'National' sources, there are often locally based trusts, business and local government sources that can be accessed in your immediate area. Drawing on these local resources rather than relying on large national funders to begin with can give you a track record to build on. It is more likely you will be effective and meet with success at the local level as local funders will know who you are, understand the issues you are working with and are generally more accessible.

## **2. You have to have a track record of receiving money to get money**

Organisational credibility is very important to funders. However, a previous track record of support is only one of the criteria that organisations are judged by. There are a growing number of funders that are interested in new organisations meeting previously unrecognised needs. They will be willing to fund new projects provided you can prove yourself in other ways (see Chapter 2).

## **3. You have to be a household name to get support**

Raising your organisational profile and raising the profile of the work you do are key factors in successfully funding your work. Good public relations and both cause and name recognition can be a major help in securing support. Who would you rather support - a group you are familiar with or a totally unknown organisation? The issue here is making your organisation known to the appropriate audience. If you only work in East Renfrewshire, it's not necessary to have a high profile in Edinburgh. Reputation in your field of work, local support and recognition of your achievements can be more important than being a well known national name. Don't be shy! If you do good work, let people around you know about it!

## **4. People only want to give to 'fuzzy warm' causes (we are not a popular cause)**

Often groups moan 'If only we worked with children or animals ...'. It is certainly true that some causes are more popular than others and are easier to interest funders in. There is, however, a wide diversity of funders out there - your job is to research which ones are interested in what you do. You are not in competition with other groups in different fields of work. If you feel you are in competition with groups that do similar work to you, you need to ask yourself some serious questions (e.g. why are you doing similar work rather than working together with them?). Funders are very sensitive to this issue. They will not support what they see as duplication and overlapping work particularly in the same geographic area.

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## **BASIC TRUTHS ABOUT FUNDRAISING**

Just as there are myths about fundraising, there are also some underlying truths or principles that apply to all organisations.

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### **1. Organisations are not entitled to support - they must earn it**

Gone are the days when local authorities and central government dispensed funding on the basis of being 'worthy'. Not only do you have to show why what you do is important and demonstrate real need, you need to show concrete and measurable results and be able to present them clearly and professionally. There is no free money.

### **2. Successful fundraising is not magic or an instant process - it relies on hard work on the part of people who are thoroughly prepared**

Fundraising must be a long-term, thought-out process to be successful. Understandably, many groups have been forced into a cycle of fundraising crises because of lack of

resources and knowledge. They raise funds haphazardly and in an ad-hoc manner. This method of fundraising ends up being a short-term solution to long-term needs.

It is fundamental to have a plan, to work strategically and to be ready for long gaps between asking for support and banking the cheque. This may mean a major rethinking of how you plan your work and may even entail limiting the scope of your work. You should never start work without having secure funding arranged. Nothing turns funders off more than cries of desperation - 'Help us or we will go under' is not an effective way of asking for support. You should always be approaching funders on the basis of your strengths and the good work that you do - not begging because of need.

### **3. Fundraising is not just about raising money - it is also about raising friends**

It's useful to think about your own personal feelings about charitable giving. Why do you choose to support one cause over another? What makes you reach for the chequebook or put money in a collecting tin? Why do you become a member of an organisation or volunteer your time for a specific cause? It's most likely that you, your family or friends have had some kind of connection with the overall cause or group - you may have received their services or know someone who has been directly affected by their work. You may know someone who has benefited or has had a positive personal contact with the organisation.

You need to apply this thinking to your own work. Who has your organisation affected or benefited in a positive way? What relationships have been formed that are positive for your organisation? These positive relationships with organisations and individuals make you friends - those who are most likely to promote your cause. They are likely to support you in many ways, one of them may be financial and this needs to be nurtured.

### **4. Successful fundraisers don't only ask for money - they get others to ask for it as well**

It's quite common to think of a fundraiser as a person who sits alone in a room with a telephone and funding directories, writing proposals. Successful fundraising needs to involve the whole organisation. It is not a one-person job.

An effective fundraiser needs to coordinate many people's efforts and provide the back-up so that the other staff, management committee members and volunteers can also participate in the fundraising process. The management committee/Trustees in particular, have a key role to play. This will be discussed in further detail in Chapter 2.





## CHAPTER 2

### Are You Ready for Fundraising?





## Chapter 2

# Are you Ready for Fundraising?



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Just because you think you need funding for your organisation, doesn't mean you are ready to start looking for it yet. As already stated, you should always start from a position of strength, not beg because of need. How do you achieve this position of strength? How do you prepare? It's useful to start from the funder's perspective.

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Funders no longer respond to the begging bowl approach. They want to see that, at the minimum, your organisation serves a real need, is well managed and can provide good value for money. It is up to you to prove it.

The following checklist can be used as an internal audit of your organisational health that will address the above points. After looking this list over and examining each area, you should have a clearer picture of your organisational strengths and weaknesses and you should be able to work towards fundraising readiness.

The items that are of prime interest or required by funders are starred (\*). The other areas are equally important for long-term success in funding, but they relate more to the internal workings of your organisation. They are considered best practice whether you are seeking outside support or not. Additional commentary has been added after each item on the list to highlight why it is of concern to both funders and your organisation.

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### 2.1 CONSTITUTIONS AND CHARITABLE STATUS

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**\*Do you have a constitution or similar governing document (trust deed or memorandum and articles of association) which sets out the aims and objectives of the organisation and the rules governing how the organisation is managed and run?**

This reassures funders and supporters that you are a responsible organisation and is a requirement if you want to apply for charitable status or apply for funding from some of the small grants programmes from funders like 'Awards for All'. SCVO produces "A Guide to Constitutions and Charitable Status" to help organisations consider the implications of the various legal structures, draw up the correct governing document and apply for charitable status, where appropriate (see below). Your local CVS (see appendix) should be able to give advice on this, as well as a growing number of governance experts.

With the advent of charitable law formation in Scotland in 2006, voluntary organisations will have a much stronger framework to relate to and also to comply with. Management Committees and Trustees need to become more aware of their roles and responsibilities in many areas and this knowledge becomes even more critical when you take the leap from being 'purely voluntary' to having paid staff and responsibilities for handling grants

and finances. It is crucial to have a well-written constitution and or governing document that reflects your specific aims and objectives rather than an off the shelf version that may cause problems later.

### **Does your organisation have charitable status?**

An organisation which is not a charity will find it more difficult to raise funds from some sources (e.g. most grant making trusts) than one which is a charity. This is because some funders are themselves charities and must therefore confine their work (i.e. grant making) to purposes which are charitable in law. The easiest way of ensuring this is to only make grants to other charities. It also gives you more credibility with other donors as they know you are complying with a minimum standard of accountability and governance.

From May 2006, Scotland has its own charitable legislation and a regulating body - OSCR (Office of the Scottish Charity Regulator). Existing charities are required to register with OSCR. Guidance on obtaining charitable status, the criteria that needs to be met and other critical information about charitable status is available through this agency.(see appendix). Please note that fundraising itself is not a charitable purpose, simply a way of enabling a charity to achieve its objectives.

In addition to having charitable status there are a number of other options now available to groups including becoming a company limited by guarantee. This status protects individuals on the management committee from becoming personally liable and should seriously be considered when the organisation moves to being responsible for paid staff and handling funding of any magnitude.

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## **2.2 FINANCES**

This section relates to the overall financial 'health' of your organisation. If you cannot answer in a positive way and demonstrate that you are addressing these points, you will need to show you are working towards achieving them. Finances and financial responsibility will be the area most scrutinised by funders.

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### **\*Do you have a bank or building society account, in the name of the organisation, which requires at least two signatures on each cheque?**

You should open a bank or building society account in the name of the organisation before you start to fundraise. For security reasons, it is a good idea to have several signatories and to ensure that at least two people are required to sign each cheque.

### **\*Do you have an annual budget, approved and monitored by your management committee? Does this include all project and project management expenses as well as all sources and uses of incoming funds?**

Clear, transparent and comprehensive accounts are the first thing any potential funder will want to see. This will indicate, at the most basic level, whether you are credible or not. This is true for groups handling £500 per year right up to £500,000.

**\*Does your organisation prepare regular financial statements which compare actual income and expenditure to the approved budget?**

Approved budgets and targets are all very well, but how does actual expenditure and income compare to the projections? It is helpful to funders to see your most current financial situation (e.g. most recent quarterly statement). Annual Reports and accounts are useful but can be as much as 11 months out of date. Funders are concerned about 'right now' as well as longer term.

**Do your accounting procedures follow current best practice guidelines?**

You need to have an expert on call to verify that everything is done properly. If you think it is too expensive, think about how expensive the consequences might be of not having it right! This form of support can often be seconded or given in kind. It's useful to have a committee member/trustee with a financial background or expertise to support this task and to be able to explain to other committee members and staff what is going on.

**\*Are you audited / independently examined on an annual basis and do you produce an Annual Report which is available to potential funders?**

Your Annual Report and accounts, if designed thoughtfully, can serve as the main piece of promotional information about your organisation and your work, as well as giving the required report on finances. If you are a Scottish charity, you must produce annual accounts that are available for public scrutiny.

You need not be audited if you are under a certain size, but may be 'independently examined' instead. This is a much less extensive process and not as expensive as an audit. Check with OSCR to see which process is appropriate for you.

Look at how other organisations similar to yours arrange their Annual Reports - with input from a designer, some photos and a little creativity, it can serve as an excellent promotion tool and save you money on other literature.

**Can you identify which projects are running at a surplus / loss and explain why?**

It is not necessarily a problem for one part of the organisation or project to be subsidised by another. You just need to be clear about what is going on. Many accounts now include a narrative explaining in non-accountancy language what it all means.

**\*Are you running at a deficit? If you are running at a deficit, do you have a plan to eliminate it?**

Running at a deficit is a big problem for funders. They will want to fund 'work', not your overdraft. You should have a plan showing how you are getting out of deficit, be able to explain what that plan is and reassure the funder that their support will not be used to get you out of your hole.

**Do you have a surplus? Is this surplus restricted or unrestricted? Will it be repeated next year?**

Surpluses or reserves can be equally problematic for the funder. They will want to know why you are not spending your own funds first, before coming to them. There are, of

course, many legitimate reasons for an apparent surplus e.g. the carrying over of project funding that spans more than one year. This is known as a committed surplus / restricted funds. It is also recognised by funders that if you have paid staff, it is good practice to have three to six months' reserves to cover running costs in case of the collapse of the charity. All of these reasons need to be explained clearly, so the funder is aware of why the apparent surplus exists.

**Do you receive more than 30% of your operating budget from one source?**

You should always seek as wide a diversity of funding sources as possible (different sources are explored in Chapter 4). Although it may seem wonderful to get a grant from the Big Lottery to cover all your costs, this is unsustainable in the longer term. What happens if / when this source is not renewed? It will be very difficult to replace all that funding at once.

It is not a good idea to be too dependent on one funder. You need to think about spreading your risk. Funders are concerned with these long-term sustainability issues. They do not want to be tied down to supporting your organisation forever. They may ask for an exit strategy (i.e. what will you do if you fail to find sufficient funding once their support is finished? What happens to the project or piece of work they were supporting).

To lessen the impact of large block funding it is important to look to expanding the number of sources you can access - 10% from one source, 15% from another can add up and make an important contribution to long-term stability. There is also growing pressure on organisations to create earned income. This will be discussed in more detail later.

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## **2.3 MANAGEMENT AND STAFF**

Next to finances, funders and supporters will want to know how well you are managed. The underlying assumption being if you are well staffed and managed, you can deliver what you propose. If you cannot say 'yes' to the following points (particularly the starred questions), you need to demonstrate how you are trying to achieve them.

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**\*Do you have an adequate number of active management committee members/Trustees and do they provide clear leadership within the organisation?**

The relative power and involvement of the management committee or Trustees in the operations of a charity varies from organisation to organisation. Funders are concerned that there are adequate controls and supervision, both from a financial and legal standpoint. Very often, it is the paid staff and / or director and volunteers that are the force that drives the work and credibility of the group. However, good governance practices, managing risk, oversight and accountability are key. In the past few years, it has been recognized that the practice of good governance, its development and importance in driving groups forward is an indicator of long-term stability and success. Investment in the training of the management committee/Trustees and strengthening their skills has a long-term benefit to the entire organization. In addition to the Chair, Secretary and treasurer, organizations should seek at least 2-3 more committee

members. More than 12 Trustees may prove cumbersome unless divided into working groups.

**Does the management committee participate in fundraising?**

Is it right to ask others to give if your own management committee have not made this commitment themselves? This question can be debated with good points scored on both sides.

Many people feel that by giving their time, they already have made enough commitment. Also, a growing number of management committees are now made up of the clients and people the organisation was set up to serve and are user led. Those individuals may not have spare financial resources or skills in the fundraising area. On the other hand, part of the responsibility of sitting on a management committee is to ensure that the organisation is able to fulfil its objectives. Financial well-being and securing funds is part of this responsibility.

There are several routes to solving this problem. One is to train up the management committee to support the fundraising process by providing fundraising courses and / or outside consultants. Another option is to co-opt additional members on to the committee who have experience in fundraising. A third possibility is to create a separate 'advisory' or 'development' committee in addition to the existing management committee. This can be made up of current executive, staff and outside expertise. This group can then take forward a focused fundraising agenda.

Whatever option is pursued, management committee commitment to fundraising is an important long-term factor to organisational survival. Funders have recognised this and look favourably on groups that show this kind of commitment to fundraising.

**Do management committee members have relationships that can help leverage additional resources for the organisation?**

Scotland is a relatively small country. Chances are that you are only two or three people removed from someone who has money or someone who knows someone who can access support. There are two main barriers to making this work for you - asking the right questions and the fear of asking. Here are some of the questions you might start with:

What is the management committee's/ Trustee make up by age, sex, background?  
*Is it diverse enough not only in terms of who you represent, but also in terms of potential community contacts?*

If members of the committee are employed, who is their employer? If they are retired, what contacts do they still have with former employers?

*The role of business support can be important in providing both in-kind and cash support. Companies always respond more positively to requests for support that come from individuals who have a connection with them. You can start with these personal contacts from your committee and build on them.*

What skills / interest / knowledge does each individual bring to your organisation? *Make an inventory of each person's areas of interests - you will be surprised at the hidden talents! It will also highlight skills gaps on the committee and give you some ideas of what other individuals you might need to add to the committee*

What clubs and organisations do committee members belong to?  
*Social clubs, Rotary, religious institutions and outside interest groups are an under-utilised source of support. You may have an introduction to them through your committee members.*

How did each person initially become involved with your organisation? What are the common threads that hold this group together?  
*By understanding the motivations and threads that draw people to your organisation, you will be able to know where to publicise your activities, recruit new supporters and / or members.*

Do committee members have friends, relatives, work mates or partners who also may be interested in supporting your work?  
*The personal contact is always more important and effective to develop than approaching a total stranger. If an individual is uncomfortable approaching a friend or colleague directly, then the fundraiser can facilitate, but getting the initial information on who to talk to is key in generating support.*

A similar series of questions needs to be asked of the paid staff and volunteers. You will be surprised at the list of people, businesses and organisations that can be generated by this process which can then be used to generate support. Individuals and organisational funders will not give if they are not asked. This may seem self evident, however many organisations often ignore the most obvious sources closest to them and ask 'strangers' first.

The whole issue of asking, how to ask and when to ask will be explored more fully in Chapter 4. It is worth mentioning now, however, that you should be building a list of not only prospective 'givers', but also a list of 'askers'. Some people feel naturally confident and at ease with this task, others do not. There is a certain amount of training on techniques that you can provide that will enable people to ask effectively, but you need to start off with individuals who are comfortable with the idea of asking to begin with.

### **Does your organisation have a stable volunteer base?**

Volunteers and volunteering have been "flavour of the month" for funders for the past few years. There are a number of national and local initiatives to encourage volunteering – both in the public and private sector. It is worth being aware of these and make contact with a local volunteer centre as well as national organisations like Volunteer Development Scotland.(see appendix). They will be able to advise you on best practice issues around recruitment and training of volunteers, how to deal with child protection and working with vulnerable people as well as health and safety issues, insurance and other best practice.



Given this national emphasis and interest in the role of volunteers, it will be to your advantage to emphasise the role of volunteers in your work (never lie or make things up). Make sure you communicate this information clearly to any potential supporters. Always back this up with facts, statistics and concrete figures. Many grant givers accept the value of volunteer time as part of 'match' funding. It's important to keep a record of how many volunteer hours are given to your organisation, what expertise your volunteers have and how you are making use of it.

**Do you have a system for recruiting, training and recognising volunteers?**

Having a system in place for the care and training of your volunteers is important to keeping people committed to your organisation. It makes your volunteers feel valued and enables them to build on their strengths and interests as well as understanding how they are contributing to your work as a whole.

If you work with children, the elderly, people with disabilities or other vulnerable groups you need to be aware of legal issues like child protection, first aid training, Disclosure, health and safety and how this relates to your volunteers and client group. How well you organise and treat your volunteers is an important internal indicator of how well your organisation is run. Funders will take note and assess your overall credibility accordingly. Some funders will ask to see your volunteer policy as well as induction procedures, child protection policy, equality policy etc.

A good 'equalities' policy for instance is not just a statement of non-discrimination, but also a series of measures that actively encourage access. This policy might include having meetings at varying times so working people can attend, providing crèche facilities, providing transport or reimbursement for transport, translating materials into other languages as well as issues around physical access to venues and events that account for people with physical impairments.

**Are your volunteers trained to be effective 'ambassadors' for your cause?**

Volunteers are the people who have given up their time to work for you because they believe that the work that you are doing is important. They are your representatives 'on the street' or ambassadors for your cause and organisation. I will emphasise again that it is essential that you provide appropriate training for them to be effective. They should be informed about, and be able to speak coherently on, the issues you represent. As mentioned above, they can also leverage relationships that may lead to funding and future support.

**\*Do you have adequate staffing to carry out current projects?**

You have to be able to prove to potential funders that you can deliver the projects you are proposing to carry out. One means of providing this proof is showing that you have adequate staff who are knowledgeable and well trained. Sometimes a request for funding includes a new post to carry out the work; in this case, you have to show how this new post will be supported by current staff. Policies on support and supervision are key indicators that you take this area seriously.

**Do you have adequate administration and support staff?**

You must not take for granted that a funder will understand your organisational structure and how it functions. Everything must be 'proved' and demonstrated. Administrative backup, adequate support and supervision and overall organisational controls are no exception. They provide the basic structure from which your work is administered. If these areas appear weak, your overall case for support is weak.

**Do you have adequate fundraising staff?**

As mentioned above, the more people in your organisation that are involved with fundraising, the stronger your base of support will be. Funders need to be reassured that you will exist beyond their grant and that they have made a sound 'investment' for the future. Showing that you are working towards involving the management committee/Trustees and volunteers in fundraising is a strong point in your favour.

**\*Do the staff work effectively with the management committee to implement goals and objectives?**

This is mostly an internal issue for you to sort out before you start asking for funding. Indications of splits and disagreements within an organisation will not inspire confidence that you can carry out proposed projects. Funders like the Big Lottery have a series of questions that will indirectly ask you to provide proof of good internal working systems and cooperation between the management committee, staff and volunteers.

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**2.4 ORGANISATIONAL CREDIBILITY**

Your overall position in the community you work in, recognition and effectiveness are part of organisational credibility. This could be a geographical community or a community of 'interest' e.g. those suffering from a specific disease.

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The issue of how others view you and your mission, as well as how your work is connected with a real demonstrated 'need', have to be proven to the funder. Do not assume that a potential funder knows anything about you or your work, including why it is important. You may be talking to a funder based in London who has no understanding of rural issues in Scotland or a company that is not aware of the local community concerns about the environment. The burden is on you to demonstrate your case as clearly and directly as possible.

**\*Do you have documented evidence of community support?**

This evidence can take many forms and can include any of the following listed below. Keep this evidence together in a file so you can send appropriate bits and pieces to funders. Look for opportunities to build on this material to demonstrate your worth.

Include things like articles in the local press highlighting your achievements, awards received by staff, volunteers or the organisation as a whole, community leaders sitting on the management committee, a record of financial contributions from individuals, cash / in-kind support from local business, statistics on the number of people accessing / receiving the services you provide, recognition by government or other agencies, active volunteer base (numbers, hard facts) and positive testimonials from clients, members and volunteers.

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## 2.5 PLANNING

In addition to fundraising readiness, it's important to have an overall organisational plan to fit your fundraising into. If you already have a business plan, this is an excellent framework (business plans are now often required by funders in addition to proposals). If not, the following is a basic outline of the kind of tasks you should be working on as an organisation to plan ahead. Business planning resources are listed in the appendix.

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Many groups have gone through parts of the planning process informally and as the need has arisen. However, taken as a defined task, the planning process consists of several elements and stages. Each part needs to be completed before going on to the next one. These stages are: Defining the Vision, Creating a Mission Statement and Setting Strategic Aims and Specific Objectives, setting and measuring outcomes and monitoring and evaluation of the whole process. There is also the question of sustainability and or an exit strategy, which needs to be included. There are some worksheets that you will find useful when going on to the next Chapter on Writing Effective Proposals.

### Defining the Vision

Your organisational vision is the big picture. This vision is the reason why your organisation exists. You may be clear in your own mind what this is, but has this been clearly defined for the outside world? For example, your vision might be to eliminate long-term unemployment for women in Dundee.

This vision does not need to be written out, but it does have to be discussed and agreed with the people who are managing and running your organisation. What is your vision?

The outcome of this discussion should lead to the writing of your mission statement. This is where you explain (in 50 words or less) what you are doing or planning to do about your vision.

### Creating a Mission Statement

The purpose of a mission statement is to give the people outside your organisation a clear and focused picture of who you are and what you actually do. An example of a mission statement related to the vision above might look like this:

<i>The IT Club is a charity, formed in 1996, which aims to provide unemployed women residents of Dundee with computer-based skills, increase their self-esteem and confidence enabling them to re-enter the job market.</i>
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Use the following worksheet to help you to write a focused mission statement.

## WORKSHEET 1 – CREATING A MISSION STATEMENT

<p>The following eight points will help you in working out your mission statement:</p>	
<p><b>1.</b> What are the objects and purpose of your organisation as set out in your constitution or other governing document?</p> <p><b>2.</b> What work are you currently engaged in? (Specific projects that help achieve those objects and purpose)</p> <p><b>3.</b> If you have been running for a while, has this changed from your original constitutional aims? If it has, how has it changed? What parts are still relevant?</p> <p><b>4.</b> What needs to be added to bring it up to date?</p>	<p><b>5.</b> What should now be the over-riding purpose and direction of your organisation? What threads hold it together?</p> <p><b>6.</b> Why does the organisation continue to exist? Who supports it?</p> <p><b>7.</b> What values hold the organisation together?</p> <p><b>8.</b> What should be the organisation's identity? How does this relate to other organisations fulfilling similar and / or complimentary functions?</p>
<p>Now write out your mission statement, keeping it under 50 words if possible - Use active verbs and focus on what you want to achieve:</p>	

### **Setting Strategic Aims and Specific Objectives**

Once you have set your mission statement as clearly and precisely as possible, then you can look at setting out your strategic aims – how you want to fulfil your mission and the specific objectives of each aim.

There is a lot of confusion by organisations (and by some funders as well) as to what is an aim and what is an objective. Very simply, aims are the overall priorities you wish to achieve and the objectives are the specific targets of that aim.

As an example, your overall aim is to provide unemployed women in Dundee with IT skills, increase their self –esteem and confidence. The specific objectives could include:

- to provide 40 places on a six week training programme for women
- to run the programme twice this year, increasing to four times next year
- to ensure completion rate of the course is over 75%
- to have at least 20 subsidised child care places available for each six week course
- to provide support in job search and place 80% of trainees within three months of finishing the course
- to provide special needs trained staff to assist with 3 places for women with disabilities
- to provide mentoring and support structures to increase confidence and self- esteem in the form of twice weekly sessions

Note that there are concrete figures and percentages, specified targets and a specific timescale.

The next worksheet is to help you tease out your main strategic aims and relate them to specific projects.

## WORKSHEET 2 – STRATEGIC AIMS OF YOUR ORGANISATION

In order of importance, list below at least three key areas that you feel are central to your organisation and that have been identified as either long or short-term aims. As you write them down, make note of which 'projects' you currently are running or would like to run that achieve or meet those strategic aims.

<p>1. Aim</p>   <p>Project(s) associated with aim</p>	<p>Now you need to look at each project that you have identified with the aims and assign specific objectives for each one. The objectives should indicate exactly what will have to happen in order to meet the aims – Make sure there are specific targets, numbers and/or percentages and a time scale.</p>
<p>2. Aim</p>   <p>Project(s) associated with aim</p>	<p>1. Project</p> <p>Objectives</p> <p>a.</p> <p>b.</p> <p>c.</p>
<p>3. Aim</p>   <p>Project(s) associated with aim</p>	<p>d.</p> <p>2. Project</p> <p>Objectives</p> <p>a.</p> <p>b.</p> <p>c.</p> <p>d.</p>

### WORKSHEET 3 – PROJECT OUTCOMES/IMPACT

Now you have clarified the over all aims of your organisation – what projects you want to run and the specific objectives of the projects – you need to focus on what the projected ‘outcomes’ or impact of achieving these objectives will be. This is a key concept for many funders. Outcomes or impact can be defined as the expected changes and or benefits that will occur as a result of achieving the objectives. This is related to but distinct from outputs, which are measurable and quantifiable activities that have occurred.

Outcomes are what the funder wants to ‘invest’ in. For example: Outcomes of running an IT training course for women could be: better employment skills and increased chance of finding a job, the positive effects this might have on single parent homes, the reduction of overall poverty in the area etc. This can be backed up by case studies of similar projects run elsewhere, studies, and testimonials from users, statistics from the local authority.

Project 1  
Objectives

What are the outcomes?

Project 2  
Objectives

What are the Outcomes?

## WORKSHEET 4 – MONITORING AND EVALUATION

You have stated your aims, objectives and outcomes – How are you going to find out if you have achieved them? This is where evaluation and monitoring come in. You need to go back to the objectives. This is what you want to monitor. Did we provide:

- 40 places on a six week training programme for women?
- Was the programme run twice this year, and increased to four times the next year?
- Was the completion rate of the course over 75%?
- Were there at least 20 subsidised child care places available for each six week course?
- Were we able to provide support in job search and place 80% of trainees within three months of finishing the course?
- Did we provide special needs trained staff to assist with 3 places for women with disabilities?
- Did the mentoring and group sessions help raise self-esteem and confidence of the women?

Also - were the projected outcomes achieved? Was self-esteem increased? How was the over all employment picture affected etc.....

Lay out below what objectives and outcomes you plan to monitor and evaluate and how you plan to do it.



You may consider ending the work once the funding comes to an end. If it has been the purchase of an asset or any similar one off activity then this may not be an issue and there is no need to continue seeking funding. If you are delivering a service, however, this may be more complicated. You may have to consider:

Can the service be transferred to another organisation?

Has the need actually been met?

Is there scope for charging fees or ways of earning income from the activity rather than becoming totally dependant on another grant?



## CHAPTER 3

### Writing Effective Proposals







## Chapter 3

# Writing Effective Proposals

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This section looks at what makes a good project for the funder, some of the jargon funders use and provides a template for pulling together a proposal. There is an example of an effective proposal, as well as some additional worksheets and checklists to help you pull together your own proposal.

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In addition to proving that your organisation serves a real need, is well managed and can provide good value for money, there are other criteria that funders will expect you to meet. Each funder is unique and has its' own set of overall priorities and interests.

Research and careful reading of the funder's material will help you to meet their specific guidelines. Never try to fit yourself into a funder's guidelines. If the funder only wants to support organisations that work with children under 12 and you work with teenagers – don't be tempted to invent a project just to get the funds. It will divert you from your core mission and only lead to problems down the line. This is known as mission drift.

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### 3.1 THE JARGON

This section will cover effective proposal writing and what makes a good project for the funder. A key point here is learning how to say what you do in language that the funder can understand, learning 'funderspeak'. Every organisation has its jargon and funders are no different. Below are some key words and phrases that funders use quite often. You may already be familiar with some of them.

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**Capital funding** - money for one-off purchases (e.g. equipment, building costs, materials)

**Revenue funding** - expenses and costs that occur on a regular basis i.e. rent, salaries

**Pump-priming** - start up grants for new, innovative projects (sometimes known as seed, or seedcorn, funding)

**Core funding** – direct funding for the central support costs of your organisation including central overheads, often salaries, management / administrative staff costs

**Service level agreement funding (contracting out)** - an agreement, usually with statutory organisations, to fund a voluntary organisation to provide an agreed service over a period of time to a specific client group or service users

**Project funding** - A discrete and defined piece of work with a beginning middle and most important for the funder, an end (after which they no longer have to support you). A project has its own stand-alone budget but can be related to the larger organisational budget.

**Earned Income** – money that can come from membership fees, selling expertise, services, or products, rent (from other organisations using your premises), investments

**Loan finance** – Securing a loan as an alternative to a grant – usually when there is clear potential for earned income or needed to cover a gap in funding that is secured

Most funders will prefer to support projects and capital rather than core and revenue costs. This can be very problematic for most organisations as core funding is the money that enables you to do the actual projects i.e. salaries. A large part of your work, however, can be broken down into separate projects and through apportioning staff time systematically across these projects, you can feed back some of this money into your core activity.

In addition, each separate project can be aimed at a different funder, increasing the diversity of your funders. There is an art to doing this, which the next section will explore.

First, what is a good working definition of a project that both funders and organisations can agree upon and how are projects different from the rest of your work?

### **Definition of a Project**

*A project is a separate, specific and identifiable part of your work. It can be part of a larger activity, but it can be completed on its own. It has a beginning, middle and end. It has its own cost-centred budget (related to the work to be done).*

What makes a good project for you and what makes a good project for the funder may differ. For instance, it may be a good project for your organisation because it raises your credibility and profile in the community, or makes use of current expertise or even because it's fun and raises staff morale.

The following list is what most funders are concerned with. How do your ideas match up? It is essential to highlight the parts of your work that mirror the concerns of the funder.

It's a good project for the funder if:

- it meets their funding guidelines and criteria or if you are approaching an individual, it is related to their interests
- it is cost-effective and value for money

- it has measurable and quantifiable outcomes (it is clear the numbers of people who benefit and exactly how they benefit or what change has occurred as a result of the work)
- it is exciting and innovative (be careful of the overused word 'new')
- it solves a real problem and meets a genuine proven need
- it has a beginning, middle and end (they will not have to fund it forever)
- it is clearly related to your organisational aims (you are not 'fitting' yourself into their criteria in order to get the grant and just chasing the money)
- it involves other organisations, shares resources and has a collaborative aspect
- it does not duplicate other services or fulfil statutory requirements that local or central government should be engaged in (unless it is a government funder)

These priorities can be summed up by the acronym SMART (Specific, Measurable, Achievable, Relevant, Timebound).

**S**pecific - does the project meet a specific need or problem or is it too general? Can you supply facts and figures to back it up? Can you quote surveys, well-known public figures in the community, newspaper articles to add to your case?

**M**easurable - how are you going to quantify the success of the programme? Who will it serve? How will you know? Funders will want to know how you will evaluate and monitor what they have funded. This information has to be presented along with the proposal.

**A**chievable - do you have the staff, expertise, knowledge and resources to carry out the project? Is your budget realistic? You need to show this clearly in any approach to potential supporters.

**R**elevant - does the project fit in with your organisational aims (funders will know if you are just chasing funding because it's available or if it is really connected to your core organisational aims). Again, you must show that it meets a real need. Don't assume that a funder will understand the problems parents face with childcare or are familiar with the particular details of unemployment / rural deprivation or lack of services in your area. Are there other organisations in your area who are already providing a similar service? If there are, how are you different? Even more importantly, how are you working with them?

**T**imebound - does the project have a beginning, middle and end? Is the timescale you hope to achieve your work in realistic?

Go back to the worksheet on your project objectives. Do they meet the SMART criteria? If not, rewrite them to take account of this.

## CHECKLIST – BEFORE YOU START THE PROPOSAL

<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Do you have a clear, agreed upon vision within your organisation?</b> Your management committee/Trustees, staff and volunteers agree on the purposes set out in your constitution or governing document</li> <li><input type="checkbox"/> <b>Does your mission statement reflect this vision?</b> Your mission statement is clearly related to the current work you do and the organisation's constitution</li> <li><input type="checkbox"/> <b>Is your mission statement brief, to the point and does it accurately reflect who your organisation is, what you do and indicate the population you serve?</b> It can be expressed in a paragraph (50 words or less)</li> <li><input type="checkbox"/> <b>Do you have clearly set out aims and objectives?</b> Ideally, these should reflect the work you are planning to do in both the short-term and long-term</li> <li><input type="checkbox"/> <b>Do they relate to the mission statement and reflect the vision?</b></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Are the objectives SMART?</b></li> <li><input type="checkbox"/> <b>Does each project have aims and SMART objectives?</b></li> <li><input type="checkbox"/> <b>Do the project aims and objectives relate to the organisational aims and objectives?</b></li> <li><input type="checkbox"/> <b>What are the Outcomes/Impact? Make sure they relate to the objectives.</b></li> <li><input type="checkbox"/> <b>Do you have a plan to evaluate and monitor the objectives and outcomes?</b></li> <li><input type="checkbox"/> <b>What are you going to do at the end of the grant? Do you have an exit strategy or a plan on how to sustain the work?</b></li> </ul>
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Have an outsider to your organisation read through what you have come up with so far. Give them a red pen and ask them to mark anything they think is unclear. Rewrite it until it is clear.



### 3.2 WRITING THE PROPOSAL

The following is an outline of how a typical proposal could be laid out. Each section will be discussed in more detail after this summary. You do not need to use this exact template, but it is useful as a guideline for what most funders expect to see. If the funder provides a form they will be asking the same or similar questions, (and you must use their form) but in slightly different language. Make sure you follow their instructions.

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Proposals to most funders (unless specified) should not exceed 2 -3 sides of A4 plus the budget. In the main, you will not be judged by your writing style – but it should not be overly casual. It's not necessary to be an award-winning writer to get funding. Brief and to the point is best. Clear prose without jargon will endear you to any reader.

It is important to realise that the larger funders can receive over 100 applications a week. Most grant giving organisations (especially trusts and foundations) do not have full-time staff to handle applications. If the reader cannot get the essence of who you are, what you do and why your work is important in the first few paragraphs, it will go in the bin and not get a reading.

### BASIC COMPONENTS OF A PROPOSAL

- **Title of project / aim** (e.g. “Adopt a Monument - local communities in action”) - this should be smart, snappy, command attention, be eye-catching, and hopefully describe the overall content / goal of the project. Nothing is more deadening than receiving the umpteenth proposal entitled ‘Education Initiative’.
- **Introduction of organisation** - this can be your mission statement, if you have a good one. It should be short (50 words or a paragraph is fine). If you are a Scottish charity, say so and give your charity number. Also state if you are limited by guarantee. Say how many years you have been in operation and if you are user led or a membership based organisation. This helps the funder put the project in the context of the overall organisation.
- **Executive summary of proposal (optional)** - This is useful for a large or complex project. If you choose to put this in at the beginning of the proposal, it needs to be a clear, well-organised piece of writing geared to attract attention from the start. It can be composed of a brief statement of the problem, what your solution is and what the funding requirements are (always ask for a specific stated amount). This gives the reader a quick bullet point summary of what is coming up. It also indicates whether the project falls within the funder's interests / guidelines.
- **The Need statement - (sometimes known as the case for support)** This is the most important part of your proposal, where you clearly explain why this project is necessary, what need you are addressing and justifying your existence. This is the place to back up your argument with facts, figures, statistics, results of a survey etc.

- **Description of project** - this is where you spell out the nuts and bolts information (the aims, objectives, and outcomes, methods, staffing / administration).
- **Evaluation and monitoring**- you need to tie this section directly into your stated aims and objectives, and outcomes - as this is what you will be evaluating.
- **Exit strategy**/ If the project will end after the grant is finished or how the project will be sustainable after the grant
- **Conclusion** - you can restate the need here. One option is to say what will happen if the need is not met, or you can sum up your main points. This is where you state your funding requirements. Again, always ask for a specific stated amount and indicate who else is funding you, how much you have already and who else you plan to ask. Do not ask the funder to give an unstated contribution towards the project or to 'give what they can'. You can ask for part of the funding, but it must be a stated specific figure. Funders like to know where they fit into the overall picture. No begging!
- **Budget** - this can be a separate attachment or part of the main proposal. Next to the need statement, this is the part of the proposal that funders will scrutinise the most.
- **Attachments / appendices** - do not send more information than you are asked for. Usually, the only extra piece of supporting material required is a copy of your Annual Accounts and / or Annual Report. If you cannot say what you need to say in the proposal and have to rely on attachments, you need to rewrite it. Occasionally, a newspaper clipping or a newsletter might be appropriate if it relates directly to the project in the proposal. If the funder needs to know more, they will ask.

## THE NEED STATEMENT

As the need statement is the heart of your proposal, you should spend some time working on this. It's useful to have someone outside your organisation read it and make comments. If they are not clear on why the project is important and who benefits, then it needs more work.

- **Find the facts and / or statistics to best support your project** - be sure your facts are accurate. Generic or broad data will dilute your point. Be sure the balance between your data and the scale of your project is appropriate - too much information for a small-scale project can be as damaging as too little information for a larger project.

The Scottish Executive and your local authority can be good sources of information on a range of statistics (e.g. health, poverty, education). Similarly, larger campaigning charities (e.g. Help the Aged, Children 1<sup>st</sup>, Friends of the Earth and the Royal Society for the Protection of Birds) often have research officers and publish relevant information about needs in their respective areas.

Newspapers periodically publish 'league tables' on health, education and deprivation. Umbrella organisations for the charitable sector also conduct and disseminate research. SCVO, Charities Aid Foundation (CAF) and the Directory of Social Change (DSC) are good places to start. If you are focused and use well defined search engines, the internet can also produce good information, but check you are using information / statistics from a known and credible source.

- **Give the reader hope** - the picture you present should not be so grim that the situation seems hopeless. The funder may wonder if their investment will make any difference. Avoid overstatement and overly emotional appeals, but be passionate about what you stand for. A balanced statement might be *"Breast cancer kills, but statistics prove that regular checkups can catch most cases in the early stages, reducing the likelihood of death. We run a programme to encourage early check-ups that will reduce the risk of death due to breast cancer"*.
- **Do you want to put your project forward as a model** - this may be an attractive idea to some funders, but it may not be appropriate for all projects. Expectations are set up to follow through with a replication plan that your organisation may or may not be able to fulfil.
- **Determine whether it is reasonable to portray the need as acute.** If you take this approach, you are asking the funder to pay more attention to your proposal because either the problem you address is worse than others or the solution you propose makes more sense than others. You will find it difficult to sustain credibility if you claim both. Emergencies like flood relief, starvation and earthquakes usually fall into what funders consider the acute area.
- **Decide whether you can demonstrate that your project addresses the need differently or better than other projects** - it is often difficult to describe the need for your project without being critical of others working in the same field. You must be careful not to do so. Being critical of other charities will not be well received by funders. It may cause the funder to look more carefully at your proposal to see why you had to build your case by undermining others. The funder may have actually supported the project(s) you have criticised.
- **Avoid circular reasoning** – This is where you present the absence of a service or activity as the problem (e.g. there is no youth club in our community) and offer your solution as the way to solve the problem (e.g. starting a youth club will solve the problem). The real problem in this case may be that young people are hanging out on street corners and that there is a high incidence of youth crime as a result of lack of facilities, therefore having a youth club will give them something constructive to do and lead to a reduction in crime. Focus on the outcomes and the change that will occur as result of the work.

When writing your need statement, you should think about answering some, or all, of the following questions:

Who are the people with the need?

*Be specific - can you define them by age, gender, social / economic status or other parameters?*

Where are the people?

*Are you dealing with a defined geographical area, a community of interest or all of Scotland?*

When is the need evident?

*Is it seasonal or all year round? If you are providing a service like meals on wheels, or providing children with a playscheme, the need may be during specific times of the day or year*

What exactly is the need?

*Again, be as specific as possible. Don't assume it is self-evident. If you are working in rural development and the funder is based in a large city, they may not be aware of the importance of infrastructure, or the impact of high transportation costs. Spell it out with being patronising*

Why does this need occur?

*Can you identify the underlying causes of the need? Put it in the context of the economy or social situation? How does this relate to the 'big picture'?*

What evidence do you have to support your claim?

*This is where you need to support your case with facts, figures, survey results or quotes from experts.*

What are the consequences of not meeting the need?

*Highlight the social or economic costs.*

How is the need linked to your organisation?

*Relate the need to your organisation's aims and objectives.*

In addition you may wish to consider:

- Identifying the most critical needs of the target group(s) you work with
- Indicating a relationship between a larger set of issues and justifying your particular focus
- Identifying approaches that have been tried and that were inadequate
- Demonstrating how your project will build on earlier efforts

- Using captions and / or quotes to organise the issues
- Organising the issues by priority

Remember - funders need to be convinced that your organisation's efforts will be directed toward solving the real problem rather than merely eliminating the symptoms.

## DESCRIBING YOUR PROJECT

The project description section should have seven subsections – (you can use information from your work sheets to fill in this part of the proposal) Aims, Objectives, Outcomes, Methods, staffing / administration and Evaluation and monitoring. The objectives and methods will dictate the staffing and administration requirements. They then become the focus of the evaluation and monitoring to assess the results of the project. The exit strategy informs the funder what happens at the end of the funding. Taken together, these seven subsections present an interlocking picture of the total project.

**Aims** – the general area, need or focus of the proposed project

**Objectives** – these are the measurable (SMART) parts of the project and should link to the outcomes

In addition to being SMART, objectives can be classified or identified as falling into one or more of the following (using an after school swimming club for illustrative purposes):

- **Behavioural objective** – a human action or change is anticipated  
50 out of the 70 participating children will learn to swim
- **Performance objective** – an expected proficiency is expected within a stated timescale i.e. 50 of the 70 children will learn to swim in six months and will pass a swimming test of 100m administered by a lifeguard
- **Process objective** – the manner in which something happens is an end in itself  
We will document the teaching method used
- **Product objective** – a tangible item results  
A teaching manual will be produced, to be used in the future with this age group-  
We will distribute it to other youth recreation groups in the area

Not all projects will contain all these types of objectives.

**Outcomes**- As a result of attending the After School Swimming Club

The children will have increased confidence and safety awareness around water, higher levels of fitness and healthier lifestyle, good model in the community etc

**Methods** – once the objectives are clearly laid out, you need to describe the specific activities, which will take place to achieve the objectives i.e. the methods. It can be useful to think about how, when and why, as follows:

- How – a detailed description of what will occur from the start to the end of the project
- When – the running order and timing of tasks (in timetable form, perhaps)
- Why – you need to say why the planned work will lead to the outcomes you anticipate, using expert testimony or examples of previous work to support you here (you may need to defend your chosen methods, especially if they are new or unorthodox)

**Staffing / Administration** – in describing the methods (above), you have probably already mentioned staffing. You need to expand on that here, to make it clear how many staff will be needed to carry out the project, what qualifications / experience they need to have and their specific job descriptions. Be clear which staff will be full-time and which part-time. Do you have to hire new staff? A short explanation will help clarify the budget.

Don't forget that staffing can include volunteers and consultants as well as paid staff. For many funders, volunteer involvement is an important part of their criteria or guidelines.

**Evaluation and monitoring** – most funders now require you to have an evaluation plan before the project is undertaken. It should be incorporated into the project proposal from the beginning. This should be quite straightforward if you have clear aims and objectives. There are two main types of formal evaluation - one analyses the process, the other measures the product. You need to decide which type (maybe both?) is appropriate for your project.

Taking the example of the after school swimming club again, you would be evaluating the following:

- Did 50 out of 70 children learn to swim?
- Did they learn to swim 100m in six months?
- Was the teaching method used effective?
- Was a teaching manual produced?

In addition you need to think about the projected outcomes.

- Did the children's confidence increase (how would you measure and evaluate this?)
- Was their safety awareness around water improved?
- Were there higher levels of fitness achieved?
- Was there an impact on creating a healthier lifestyle?

Depending on the nature and length of your project, how often should you be assessing and monitoring its progress – weekly, monthly, quarterly? What methods will you be using to do this (some common ones are face to face interviews, surveys, site visits,

research, physical evidence, telephone / postal questionnaires and follow-up interviews)?

Are the original assumptions you made about the project still valid? Are the strategic aims still the right ones? Things may change e.g. the teaching method used may not work or staffing levels may need to be increased. You also need to evaluate the performance of the management e.g. are you within budget.

Another factor in all of this is that evaluation and monitoring will require staff time and probably a line item in the budget. If you fail to take account of these costs when looking at the overall project, you may find yourself in deficit.

Exit strategy/Sustainability – Will you be wanting to run further swimming classes? If so how will they be funded- Maybe the children will be willing to pay a small fee? Will the local authority underwrite some of the cost for the next series of sessions?

## **THE BUDGET**

The budget can be a separate section, an appendix or integrated into the method section. This is the area where many organisations fall down, usually by failing to take account of hidden expenditure or leaving something out or by guessing. This part of your proposal needs to be as thoroughly researched as possible. Get at least two quotes on things like printing costs, training, supplies etc. before you put a figure in the budget. Ask for recommendations from other groups - ask for quotes from several suppliers.

Believe it or not, one of the biggest complaints funders have about budgets is that the figures don't add up. This may sound obvious, but the first thing to do is to check your calculations!!!

Remember, if you under cost your project, you may put your organisation into deficit. Some common mistakes include:

- forgetting to include National Insurance and pension costs in salaries
- advertising and recruitment is expensive – if you have to hire new staff check how much this will cost and take account of it in your budget
- you may need to provide training for new staff - what are those costs?
- adding new staff or expanding a programme may increase your insurance costs - have you researched this?
- do you need extra equipment, materials, or larger accommodation as a result of this project?
- travel and accommodation can also be expensive. You may need to point out the particular travel issues unique to rural Scotland e.g. a training trip for staff from the Western Isles to the central belt can cost as much as a cheap fare to Florida in the USA! Fuel can also be more expensive than in other parts of the UK. Time to travel may mean an overnight is required – Have you costed for accommodation and meals? Make sure you calculate for these issues.

- If you are asking for more than one year's funding, have you accounted for inflation and cost of living pay rises for each additional year? Check with other organisations, the local authority and / or trade unions to see what they predict for pay rises in the short and medium term (3 –5 % has been a reasonable minimum in the past, but may change).
- Have you included a 'cost to core' or administrative fee in your budget? This is the cost to the organisation to run the project. It is often referred to as full cost recovery. It consists of the real cost of the staff time, the director or project manager has to spend supervising and monitoring the project work and other on costs to the organisation as a whole. You may incur costs relating to extra lighting, heating, time spent in meetings etc. It is the item most often left out. An overall figure of 15-20% of the total budget is considered usually adequate and is accepted by most funders (European Union funders often have more restricted guidelines). However some projects may have a higher organisational cost. Think this out carefully and be prepared to defend your figure. This percentage is taken from the total cost of the project and added on as a separate item (see budget worksheet).

This fee is essential to the organisation as it truly covers the costs by feeding back into the running costs of the organisation.

It is crucial to bear in mind that once you have stated expenditure, you are committed to doing what you say. If you cannot fulfil this (whatever the reason), you must discuss it with the funder. Usually an accommodation can be made or changes can be agreed upon. Only in worst case situations will the funder insist that you return the money. If you have not discussed it however, you may find that not only have you jeopardised the present funding, but future funding as well.

Budgets can be the most boring part of your presentation. Here are a few ideas for new ways of presenting costs that might catch the funder's interest:

- how much does it cost per activity? Each swimming class?
- what is the cost per beneficiary? – Per child?
- can you cost by location?-
- can you cost per day / month / year?
- what is the cost per item? – to produce the swimming manual?
- what is the cost per worker? Can be this be related to outcome or product?
- what is the cost per achievement?



## WORKSHEET 6 – COMPONENTS OF A PROPOSAL

Title of project / aim
Introduction to organisation
Executive summary of proposal (optional)
The need statement (Make your case)
Description of project - Nuts and bolts information
<ul style="list-style-type: none"><li>• Objectives</li></ul>
<ul style="list-style-type: none"><li>• Outcomes</li></ul>
<ul style="list-style-type: none"><li>• Methods</li></ul>
<ul style="list-style-type: none"><li>• Staffing / administration</li></ul>
<ul style="list-style-type: none"><li>• Evaluation and monitoring</li></ul>
<ul style="list-style-type: none"><li>• Exit strategy/Sustainability</li></ul>
Conclusion

**WORKSHEET 7 – SAMPLE BUDGET FOR A NEW MEMBER OF STAFF**

SALARY (if more than one year, include salary / cost of living increases for each year)	_____
TAXES	_____
N.I.	_____
PENSION	_____
ADVERTISING AND RECRUITMENT	_____
TRAVEL / SUBSISTENCE (per mile, per person)	_____
TRAINING (including conferences, workshops)	_____
PRINTING / COPYING	_____
POSTAGE	_____
TELEPHONE / FAX	_____
COMPUTER / PRINTER EMAIL / INTERNET MODEM	_____
OFFICE FURNITURE	_____
RENT	_____
UTILITIES (electricity, gas etc)	_____
INSURANCE	_____
MATERIALS (list these)	_____
ADMINISTRATION (15-20% of total budget)	_____
<b>TOTAL</b>	_____

## **PROPOSAL STYLE AND PRESENTATION**

These suggestions come from funders and are an indication of what they like to see and what they find the most readable. All proposals should be neat and typed. They need not be 'glossy' to impress. Occasionally you may have to handwrite in an application form. Make sure the writing is legible. The image you project should be professional and business-like. The funder should be reassured you will be responsible in handling both the funding and the work you are proposing.

- select an interesting, descriptive title
- use 2.5 cm margins - it makes it more readable and clean looking
- keep fonts consistent and of a reasonable size (at least 12pt) Times Roman, Arial and Helvetica are the most readable
- spell out acronyms the first time and keep jargon to a minimum - you may know what it means, but don't assume the reader does
- begin each section with a strong, clear sentence
- use topic headings to guide the reader
- use lists or bullet points to summarise information
- keep sentences short
- never bind proposals unless requested - they often have to be copied for several people to read
- don't use fancy notebooks, folders, tabs etc – this impedes easy copying
- don't use coloured paper for the text - it does not reproduce well
- make sure that attachments don't weigh more than the proposal - only send what is requested (Annual Report/Accounts are usually enough)
- don't include generic letters of support - get references for the specific project you are proposing or related to specific work done in the past – Make sure the referee knows the work, has a copy of the proposal and can speak coherently about your organisation
- don't enclose loose photos - they will get lost
- don't include critical information in attachments that was not included in the proposal
- don't put in odd-sized promotional materials, certifications, awards or citations, videos etc. unless specifically requested - they are not usually looked at

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### 3.3 A SAMPLE PROPOSAL

The following is a sample of a how a proposal might look generally following the format previously set out. Note that the request for funding is repeated, once in the third paragraph and again at the end.

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A request for support for The Refuge Charity submitted to the ABC Trust

<b>Who we are and what we do – (Organisational description)</b>
-----------------------------------------------------------------

Refuge Charity (Scottish Charity #101010) addresses the causes of homelessness in Scotland through our activities and projects using:

- Advocacy
- Direct service
- Public education

We operate innovative housing and social service programmes demonstrating the principles of empowerment, self-sufficiency and community building. Since our founding in 1981, The Refuge Charity has assisted over 5500 people, providing not only shelter, but also employment and job search skills, job coaches and general support to the homeless and working poor of central Scotland.

The Refuge Charity is requesting support from the ABC Trust in the amount of £xxx for the 2006-7 programme year. This will go to our Coop Hostel Programme, which is currently in its third year of successful operation. Seventy per cent of our 2006 budget has already been raised through the xzy local authority, the ZZZ Trust and fundraising events. Several individual donors have also made substantial gifts.

<b>Why our Work is Important (The Need – Making the Case)</b>
---------------------------------------------------------------

In our work with the homeless, we have documented the increasing need for services beyond the emergency relief that we started off providing. In a joint survey done in 2004 by the yyy agency and us, it was shown that when transitional housing is supported with one to one counselling and emotional support and when there is a structured follow up and living support programme, the underlying causes of homelessness can start to be addressed. This form of support reduces the likelihood that individuals and families will return to the street and enables them to enter back into the mainstream of the society with enhanced emotional confidence and the practical skills needed for daily living. (Detailed research report available on request). Through our Co-op Hostel, we propose to put into practice a programme, which will achieve these ends.

<b>The Project (Aims, Objectives and Outcomes)</b>
----------------------------------------------------

**The Coop-Hostel** - is a six-month to two-year transitional housing coop programme which houses up to 20 people who are ready to take a step towards independent living. This facility provides a clean and sober environment with an emphasis on community living. Residents must be working, attending job training or attending school. The funding would enable us to:

Interview and assess 50 individuals and or families from the temporary shelter programme and drop in centre over the next 3 months  
Conduct individual needs assessment leading to the selection of up to 20 individuals/families to move into the hostel programme  
Provide one to one support on a daily basis over the following year to 18 months including job/education support, alcohol and drugs counselling, and group work  
In the case of family groups we will be able to provide day care for young children and support their attendance at local schools

**At the end of 18 months we will have**

- 10 individuals who have completed a basic skills training programmes or are working towards an SVQ or other practical qualifications or apprenticeships
- 5 individuals who have successfully held down jobs and are ready to move into more independent living arrangements
- All individuals will have completed a basic life skills coaching and counselling course and have attended alcohol/drug counselling where appropriate
- All individuals will have basic cooking and self care skills

<b>Community Involvement and Partnerships</b>
-----------------------------------------------

The community in which the hostel is located has been actively involved in the current programme. To date we have over 10 local volunteers who regularly contribute time in assisting the residents with daily living skills such as meal planning, budgeting and emotional support as well as finding donations of furniture and kitchen equipment. The project also has strong ties to and works collaboratively with area social services, the local GP practice, The Day centre, a further education facility and two job-training schemes in the area.

The paid staff consists of 6 full time and 9 part time individuals. Over 60% of the current staff are former residents at Refuge's Hostel or have been homeless themselves at some time. This intimate knowledge of the issues of homelessness gives the staff the skills and credibility they need in order to form the kind of supportive relationships necessary to make the programme work.

<b>Evaluation and Monitoring</b>
----------------------------------

In addition to monitoring and measuring the progress of the individuals and families participating in all the Refuge's programmes on a weekly basis, we evaluate the overall effectiveness of our outreach in several other ways.

- Surveys from drop-ins at the storefront centre are fed back to the staff, as is feed back from social services, the police and the local Day Centre. We meet regularly with our contacts in the local Day Centre, Further Education Centre and training programmes

- Residents in the Coop Hostel elect 3 representatives to sit on the Management Committee and also feeds back on the programme's progress
- Staff keeps track of individuals who have left and or completed our programmes and track their progress in the community.

Measures used to quantify results are as specific as possible, including physical health of residents, job search results and training level achieved.

Support from the ABC Trust in the form of a £xxx grant will help us ensure that we can continue to provide the staff support that is crucial to success of the Coop Hostel. It is their skills, training and support to the residents that facilitates each individual's progress towards self-sufficiency.

#### **Exit Strategy and Future of the Programme**

The Refuge Charity is currently setting up two social enterprise businesses connected to the Hostel. The first one involves furniture recycling and supplying other Hostels in the central belt with 'starter packs' for residents in similar programmes. This provides training and employment to two Hostel residents, the profits going back into the programme once the workers are paid. Now at the end of its first year, it is at break-even point with a projected profit of yyy for 2007. The second business, an Internet café is still being piloted. We also intend for this business to make a profit, employ Hostel residents and contribute back into the programme. As a financial bridging measure until both businesses are in full operation we intend applying to zzzz and kkkk for the gap funding and have secured a loan to purchase equipment.

## CHAPTER 4

# Finding the Funders









## Chapter 4

# Finding the Funders

Before you start researching funders, it is useful to see where charities in Scotland actually get their funding from. This information may shatter some of the fundraising myths that many groups subscribe to e.g. that the prime source of support is the government and that the business sector has a lot of funds to give away. An important point to note is the significant amount contributed by earned income i.e. Trading rent and investment. This trend is increasing in importance.

### 4.1 Income to the Voluntary Sector (from SCVO research 2005)

TRADING, RENT AND INVESTMENT (earned income)	44%
LOCAL AUTHORITY	27%
VOLUNTARY INCOME	16%
Donations	8+
Trusts	6+
Private Sector	1+
PUBLIC SECTOR	11%
Includes Scottish Executive, Scottish Natural Heritage Historic Scotland, Health Boards and Local Enterprise companies	
LOTTERY	2%

**Note:** Voluntary Income includes Give as You Earn and Legacies  
Local Authority funding includes Service level agreements and contracting out  
Lottery includes The Big Lottery, Awards for All, and Heritage Lottery Fund

## **Sector share of income – What type of organisations get how much**

SOCIAL WELFARE	37%
COMMUNITY DEVELOPMENT And SOCIAL ENTERPRISE	24%
HOUSING	12%
HEALTH	11%
ARTS AND SPORTS	11%
LEARNING	7%
ENVIRONMENT AND ANIMALS	4%
EQUALITY AND LAW	4%

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### **4.2 THE USUAL (AND NOT SO USUAL) SUSPECTS**

When you look at the process of finding support, you should have funding from as many sources as possible. The following are the main sources available that you should investigate. Even if you only get 5 -10% from some of these areas, it will help you to get away from a single source of funding and spread the risk. Some of the sources may need match funding or need to be put together in packages as part of partnership funding. These aspects are discussed in a further section on matching and partnership. There are a few case studies to give you an idea of the kind of project each type of funder may be interested in.

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## **a. TRADING, RENT AND INVESTMENT**

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### **Earned Income**

This is income you can generate by the sale of your products or services, rental of spare space or assets, interest you earn on bank accounts and investments. Some specific examples include fees for the services you provide, income from events (see below), consultancy and training delivered to other organisations (using the expertise of your staff and management committee), sales of publications or other products you might produce. Membership fees can be considered earned income or come under individual giving. (see next sections)

There is a great deal of pressure on the voluntary sector to become less dependent on grants and generate their own income. Some organisations are better placed than others to explore this area of income. You may have 'natural' products and or services that arise from your mission or you may already be service based and have developed partners and relationships with local authorities and other agencies to which you can sell your services or charge a fee. If that is the case, it is feasible to explore this area more intensively with some expectation of potential returns.

If this is a new area for your organisation, a pilot or feasibility study is definitely advisable, as contracting out your services to a business or a local authority can also be a minefield. Training services, for instance are well developed in the voluntary sector-

Find out who else is already offering what you are considering selling. You may find its more competitive than you originally thought and the market may already be saturated. Get advice from other similar organisations already doing it. Do not reinvent the wheel. Other groups are usually flattered to give advice and share their expertise. Bear in mind that any activity that involves business or trading may have legal and VAT implications. Also you need to make sure your governing documents, constitution etc permits you to engage in this.

Running a business (which is what you will be doing) requires a different set of skills and attitudes than most voluntary organisations are used to. You will probably need additional committee members with expertise in new areas, and perhaps additional staff with different skills and or training in areas like marketing PR, and sales .

Most new businesses that fail can trace this failure to lack of investment. You may require capital grants or other forms of support before you see a profit. This also may mean investing in an activity for a while before it is profitable. There is also the option of securing a loan instead of a grant. There are a growing number of sources (including some grant giving Trusts) that now specialise in lending to the voluntary sector at favourable rates. They will want to see business plans, marketing strategies and they will examine the organisational capacity to take on this new activity.

All of these warnings are not to discourage you from exploring earned income, but rather to urge you to be realistic as to how much research and preparation needs to be put in first. On the positive side, earned income provides you the freedom to spend the proceeds in a way that suits you and this can then fund the less popular aspects of your work that other funders may not prioritise. It is also the most sustainable form of income providing you can make a profit.

It's worth noting that there are a growing number of Social Enterprise organisations who fill a relatively new niche between the voluntary and business sector. They do this by combining a business and social ethic - providing services and products that meet social needs. These organisations and their support networks are a good resource for ideas, practical experience and advice. (see appendix for resources). Below are two case studies - one an environmental group, the other an organisation working with people with mental health problems and disabilities.

### **CASE STUDY**

**Aberdeen Forward** -Funding for projects has, in the past, come from the landfill tax credit scheme, national government grant programmes and through the national lottery. Recently the organisation has made the decision to become a social enterprise and is working to become more self-financing and to reduce the need to continually chase grant funding. Aberdeen Forward is an environmental charity, which runs a number of different projects in the city and across Aberdeenshire.

Traditionally working in sustainable waste management, Aberdeen Forward is looking at projects that expand the use of existing facilities in innovative ways to address community needs (e.g. a drop-in cafe, or a museum education room for use by the

community). Also projects that improve the quality of, or create parks, play areas, green spaces, indoor and outdoor sports facilities, amenity green space and provision of facilities for teenagers and children in order to improve quality of life. Examples include:

### **Grampian Real Nappies**

The Grampian Real Nappy Project aims to promote the use of cloth nappies as an alternative to disposables. The Grampian Real Nappy project offers:

- £30 cash back incentive - for parents trying cloth nappies
- free nappy trials - if you want to try before you buy
- advice on using real nappies - information about different brands and styles

### **Community Composting**

Aberdeen Forward has worked to help Aberdeen City Council establish 10 community composting sites by 2010. This target has already been achieved in 2006 – 4 years ahead of schedule. These community composting sites will contribute to the targets set out in the Grampian Area Waste Plan, the National Waste Plan: Scotland and the Landfill Directive, limiting the amount of biodegradable waste that can be sent to landfill.

### **Creative Waste**

The Creative Waste Exchange has been developed with donations from local businesses and is being developed as an independent social enterprise that will work on a membership basis.

## **CASE STUDY**

**FEAT Enterprises** aims to provide real job opportunities at a real wage, for people with a disability or other disadvantage in the labour market through the commercial development of social enterprises that, whilst providing a supported and integrated setting for their participants. There are 3 core businesses at the moment:

### **'THE BURGH LODGE'**

The Burgh Lodge is a 4 star tourist accommodation in Falkland, Fife. It offers value for money accommodation to families or groups of individuals and also has a number of suites of rooms for people with disabilities.

### **'THE GREEN TEAM'**

The Green Team is a landscape and environmental improvement business. It undertakes a wide variety of environmental and soft/hard landscaping contracts in East Central Scotland.

### **'SpringBack'**

SpringBack is a mattress/bed recycling facility that deconstructs mattresses and other bed parts for recycling. Thereby diverting them from landfill.

In both these case studies there is a combination of business and social purpose. They provide employment, contribute to the local economy and are looking to be largely self-sustaining in the long run.

## **Events and Functions**

Raising money from events and functions is time-consuming and often yields a small financial return for a lot of effort. In addition, there is often the need to spend money upfront to prepare.

To have events work well and make a profit, there are two essential ingredients: a reliable and committed pool of volunteers and support from local business and the community. If you cannot access these, then you are unlikely to have a good financial return on your time and effort. Make sure all your expenses are covered and you have made the majority of money you hope to raise before you even hold the event - this can be done through securing sponsorship from local companies, pre-event ticket sales or through commercial advertising by businesses in a programme.

That is not to say that events are not worth doing for reasons other than pure fundraising. Very often, events are an important way to raise your organisational profile, attract new members or supporters and give you a chance to promote your work to a wider audience.

The more original and fun the theme, the better. Everyone has been to a dozen bring and buy sales, sponsored a walk or been asked to buy a raffle ticket! Be creative and try to target a specific audience and their interests. Its key that the event is intrinsically interesting – something that would attract an audience even if it was not for a good cause. Ask yourself if you would go even if it was not in aid of a good cause.

It is important to allow enough time for planning. It is the details that make or break successful events. Let the local press know well in advance (find out their publication deadlines), invite past supporters as well as new potential supporters, take photographs for post event publicity, annual reports and your own records.

Make sure you keep a record of who attended or participated. You can then mail them information about your work later, ask them to become supporters again and build up a base of longer-term support, not just one-off contributors.

There are a number of pitfalls and problems to watch out for when running events. They include: Applying for all appropriate licenses are applied for in plenty of time i.e.;

- Fire certificates
- Raffle/lottery licences
- Food laws (check with local authority)
- Alcohol/age restrictions
- Trading if selling goods

If you are hiring a venue check for the maximum occupancy, that you are complying with any relevant Sunday Trading laws, and that you have made adequate insurance provision. In addition consider: VAT liability, adequate staffing on the day, contingency

plans in case of bad weather if you have an outdoor event, local authority permission for signage, Police and Fire notification if outdoors and large crowds and traffic and parking implications.

A time line for planning an event is outlined below.

#### *6-12 MONTHS PRIOR TO EVENT*

- Decide on aims of event (raising profile, getting new members, promoting your cause, celebrating a success, honouring your supporters, etc)
- Set up an Events Group of volunteers
- Designate a coordinator or chair who reports back to your staff/trustees
- Decide on the nature of event

Evaluate your resources and set a fundraising goal

- Start preparing lists of potential sponsors/in kind donators
- Start preparing sponsorship pack – letter to sponsors, requests for specific items, information about organisation

Set and book venue and develop budget

- Keep your audience in mind – what size and what constituency

#### *5 + MONTHS PRIOR TO EVENT*

- Start approaching your targeted sponsors with your pack
- Follow up your approaches
- Approach suppliers for donated goods
- Start recruiting volunteers for the day
- Monitor response from sponsors
- Apply for relevant licenses

#### *6-8 WEEKS PRIOR TO EVENT*

- Invitations go out to general public
- Posters/flyers start to go up
- Publicity starts - Newsletters, in house network
- Check deadlines for listings in media
- Monitor your budget

#### *3-4 WEEKS PRIOR TO EVENT*

- Press Releases to the local press
- Newspaper listings
- Check with your venue on any last minute details

Do an honest evaluation after the fact. How much did you raise? Did you gain any new supporters volunteers or members? How well did the publicity go? How might you improve on it next time? Ask the participants and volunteers for their feedback. What did they think? What would they like to do in the future?

### **CASE STUDY - WINTER VACATION PARTY**

An Arts organisation held a winter vacation party. The venue was the local airport. The invitation asked the participants to come dressed as if they were going on vacation (about half came dressed for a ski holiday, the other half for a sunny destination). The 'mystery destination' vacation raffle was held on the spot and the winners left that evening on a plane (free flights and accommodation had been secured as prizes beforehand).

Catering had been donated and enough pre-event tickets had been sold to cover the cost of the event and achieve the fundraising goals. The excitement generated by the mystery location and the novelty of the party venue added greatly to the event's success.

## **b. INDIVIDUALS**

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Individual giving is an important income source to the voluntary and charity sector even although it is not the largest source in terms of overall income to the sector. Like earned income, organisations can use it to support core and running costs, and if done carefully individual giving can attract 'gift aid' which adds additional 'free' money from Inland Revenue. It is often overlooked as an income source by small and community-based organisations because people have difficulty in asking for support in a direct manner. Individuals can be encouraged to provide support in the following ways:

- by becoming members or supporters and friends of your organisation (e.g. through an annual subscription, direct debit)
- through donations (tax-effective wherever possible) – see below on Gift Aid / payroll giving
- through direct mail appeals / telephone solicitation
- by face to face asking
- by collection tins / flag days / street collections
- through attending events
- by leaving you a legacy

In addition they can be encouraged to bring their friends on board, volunteer their time and generally spread the word about who you are and what you do. They can then also be the 'ambassadors' for your cause. You need to cultivate, recognise and reward your supporters - thank them, invite them to your events and continue to engage them in your work. They are important to the long-term survival of your organisation and can serve as your ongoing base of support.

It is essential to keep careful and detailed records on who has given you a donation, how much they have given, the reason why they gave (to what project or appeal) and keep these records on a yearly basis. These donors can be asked to support you again

in another year (in some cases in another 6 months). If they liked you enough to give you money this year, think how happy they will be to support you again next year after they see what wonderful work you have done and how successful your programme has been because they have supported it!

Many groups fail to go back to their original supporters to ask again. You need to think about this process in the following way. Who is more likely to give support - someone who is already familiar with what you do and has given support in the past, or a complete stranger?

Tips for successful individual giving:

- Examine your own feelings about money - if you are uncomfortable about asking other people to give, you will not be successful. Be sure you have the right people asking.
- Research is the key to success - you should have as much information as possible about each person you ask. What are their specific interests? How are these interests connected to your cause? How much do they know about you and your work? What is their past record of giving to you? How much are they prepared to give? Who is the best person to ask them? What is the best method to use when approaching them?
- Determine a goal for donations - you should set an overall goal for individual donations. Say you want to raise £1,000. How many people will you have to ask? How many will potentially give £100? £50? £25? This needs to be planned and approached systematically.
- Establish a budget - it will cost money (and time) to raise money. Consider telephone bills for a telephone campaign, postage and stationery if you are asking by letter, expenses for volunteers etc.
- Ask those people who have supported you in the past first - this goes back to basic principles of fundraising that have already been mentioned. Start with those who already know and appreciate you.
- The success rate with personal solicitation is 50%. People are more likely to say yes if you talk to them directly face to face, telephone is next best, then by letter. Research is still being done about e-mail and how effective this method might be. If you already communicate with your supporters by email and they are comfortable with this form of communication, it can be more effective than by letter.
- 80% of the donations will come from 20% of your donors - this is known as Pareto's Law. Since a small number of supporters will be responsible for the vast majority of your income, you should aim to continually increase the total number of contributors.



- Be prepared for people to say no - you have the right to ask and people have the right to say no. Do not take it personally. Try to find out why they have said no, without being pushy. They may give at a later date.
- Be sure you thank each donor in a personal way - this may sound obvious, but the major complaint of donors is that they have not been recognised or thanked properly. A hand-written note or face-to-face thank you is essential. Consider the age of the donor and expectations, culture and past experience they may have in giving. All of these factors will contribute to how you take care of them.
- Keep good records - you should know exactly who gave you how much, when they gave it to you and why. This information is important when you go back to them in a year's time, as well as for reclaiming tax under gift aid. It is also important to see what your average donation is, what your base of support is made up of and how successful your campaign has been.
- Evaluate the campaign - evaluation is essential if you want to build on your successes and not repeat your mistakes. How much did it cost? Who responded and who didn't? Why? Maybe a change of approach is called for if you want to develop a long-term approach to securing income from this source.

#### **CASE STUDY - DIRECT MAIL**

A membership-based youth charity setting up a network of activity clubs was unable to secure funding for training the leaders of the clubs in child protection and First Aid through its usual funding sources. They wrote an appeal letter to each of their members outlining the need for training and asking each person to contribute. Someone the recipient knew signed each letter. The appeal was reinforced in the newsletter (gently) and Management Committee members were encouraged to give 'lead' gifts to match. A specific goal was stated and the membership was kept informed on how the campaign was going. The goal was reached in three months. Each donor was thanked with a hand-written note.

#### **Gift Aid on individual donations**

What is Gift Aid? Gift Aid allows a registered charity to claim, from HM Revenue and Customs, the basic rate of tax on a donation made by a tax-paying donor.

How much is it worth? As the current base rate of income tax is 22%, your organisation can claim 28 pence for every £1 donated. This is because they paid tax on the gross amount of the donation. This is calculated by multiplying the donation by 22% and then dividing by 78% (100%-22%). This, for a £1 donation, gives claimable Gift Aid of 28 pence.

How does it work? As long as a person is a UK taxpayer, and has made a declaration to that effect, a charity can claim Gift Aid on any amount donated by that person on or after

6 April 2000.

What is a Gift Aid declaration? A Gift Aid declaration is a simple form filled in by the donor giving their name and home address details along with a statement confirming that they are a UK taxpayer.

Encourage this tax efficient way of donating. This is free money from the government at no extra cost to the donor! Similarly, payroll giving has tax advantages for both the donor and the charity.

#### **CASE STUDY - GIFT AID**

A heritage and culture charity regularly devotes a section of its newsletter to show its members how they can support the organisation. In one issue, the benefits of Gift Aid were explained in detail and related to a specific project e.g. ten donations of £25 will support the restoration of ..... When gift aid is added this will total xxx.

The organisation is presently encouraging current members to convert their membership into Gift Aid by sending out the appropriate gift aid form with the membership renewal forms. So far, 70% of members have done this, increasing revenue by several thousand pounds per year at no cost to the donors.

Below is a model Gift Aid declaration form that can be used when an individual wants to donate to a UK charity. Simply have each donor complete this form (remembering to insert the name of the charity)

I would like to make a donation to \_\_\_\_\_ (name of charity) using Gift Aid. My details are:

First name \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

I would like to Gift Aid the enclosed donation of £ \_\_\_\_\_

I would like to Gift Aid all donations I've made to \_\_\_\_\_ (name of charity) since 6 April 2000 and all donations in the future until I notify you otherwise.

To qualify for Gift Aid, what you pay in income tax or capital gains tax must at least equal the amount the charity will claim in the tax year.

#### Payroll Giving

Payroll Giving is another tax effective way for individuals to give to charity. By having their donations come straight from their gross pay before tax, employees effectively

increase the value of their contributions with no cost to them. Currently over £70m is raised for charitable causes in the UK through Payroll Giving.

How does Payroll Giving work? Providing that the donor's employer offers Payroll Giving it is quite straightforward. The donor authorises their employer to deduct regular charitable donations from their pay. The employer then pays these donations to a Payroll Giving agency approved by HM Revenue & Customs. The agency then distributes the money to the charity or charities of the donor's choice.

What are the benefits of Payroll Giving for the donor? The agreed deductions the employer makes from the individual's pay are done before they pay tax, which means that they get tax relief included in the donation at their top rate of tax.

For example, if they are paying tax at the basic rate it will only cost them £3.90 to donate £5.00 to the charity of their choice.

The main benefit of Payroll Giving to the charity is to create a regular flow of funds. In addition, there is little or no administration at the charity's end.

In order to make this work for an organisation, there needs to be a fair amount of promotion and education of the benefits for all concerned. This can be done through articles in your newsletters, a special mailing to your existing supporters, information on your website and of course face to face explanations. The recruitment of 10 supporters giving £5 a month for instance can generate £600 per year with no repeat appeals

### **Legacies**

Around 1 in 20 people leave charities a legacy. They can specify either a fixed amount, or a given percentage of their estate to go to an organisation.

Any charitable donation is exempt from tax, which means that any money left to charities in a Will is **exempt from inheritance tax**. For example if someone dies with an estate worth more than £285,000 (2006) which is left to someone other than their spouse, there is tax payable at the rate of 40% on the amount above the £285,000. Anything left to a charity is deducted before any tax is calculated and doesn't affect the £285,000 allowance. Charities are not liable to pay tax on money left to them in wills.

Some charities get as much as 30% of their annual income from legacies. The issue for most organisations is how to broach this 'delicate' subject with potential supporters. It's worth looking at the literature of other organisations that have been successfully promoting legacies for a long time to get ideas of how you might start. For example The National Trust for Scotland, RSPB and a number of health related causes have dedicated departments and campaigns to encourage supporters to remember them in their wills. Look at their web sites, read their brochures.

Bear in mind this is not predictable form of income (until you have been doing it for many years) and there is no pro-active legal way of encouraging people to die and leave you

money. The most pragmatic way to start, is to include the idea on your literature along with information on gift aid and payroll giving.

### **Membership or Friends programmes**

Setting up a membership or friends and supporters scheme is one way to ensure unrestricted and ongoing income to your organisation. You need to check that your constitution allows for this and amend it if necessary.

Some membership schemes allow for the addition of Gift aid (see above). It is worth considering setting this up at the beginning as it will add 28% to your income at no additional cost to the member/supporter. Check with HM Revenue and Customs about the possible restrictions.

The first thing you need to think about is what can you offer as an organisation and what are the benefits to your potential member or supporter. Once you decide this, you can set your fee structures and devise different options i.e. Individual member, Family membership, Corporate friend/supporter, etc. This will not be cost free to you. When making the calculations be sure to include some compensation for your time in administering the scheme and the concrete costs of the benefits you provide (see below). It's also a good idea to look at other such schemes that are on offer in your area of work. How much do other groups charge for membership? What do they offer?

You can look at benefits in two ways: Hard benefits - where there is a direct monetary or measurable value for the supporter and Soft benefits, where the supporter's experience is enhanced or enriched in some way.

Examples of Hard benefits may include:

- Free entry into to events (if you have chargeable options)
- Mailings, newsletters and other publications
- Discounts on products and services
- Access to the expertise of the organisation and staff (advice, advocacy,)
- Priority or privileged treatment (compared to non-members)
- Reciprocal benefits with other organisations
- Social activities and use of specialised or unusual facilities

Soft benefits are by definition harder to quantify and will vary from organisation to organisation – They may encompass things like 'the feel good' factor, or focus more on political, social or educational areas. They are usually related to the supporter's commitment to the cause or personal connection to the organisation. These benefits will differ from organisation to organisation.

Have a brainstorm with your current staff and volunteers and Trustees – What can you offer and what are the concrete as well as perceived benefits of your organisation? How can you develop them into a 'package' and sell it to the public?

Benefits can also be further categorised into supporter related, programme related, visitation related and cause related areas. For instance supported related benefits could include:

- Supporter card, sticker, pin, bumper sticker
- A Supporter directory (networking benefit)
- Recognition on a wall, plaque, building, list etc
- Logo merchandise
- Discounts to be used for organisational products
- Gift certificates to use on organisation goods and services

Programme related benefits could include things like:

- Supporter/friend only events
- Special lectures, talks, visits by experts
- Tours, walks, 'behind the scenes visits' not available to the general public
- Tickets to events, performances, special exhibits
- Educational programmes
- Special benefits for children –, birthday parties, special events
- Supporter only section on your web-site
- Discounts on public programmes (if there is a charge)
- Involvement in your general programme and activities –volunteer opportunities
- Reciprocal arrangements with other organisations
- Hot line, advice service

Visitation related benefits are relevant if you have a premises or special site you care for and could consist of:

- Reduced or free admission charges or fees
- Access at non-public hours i.e. evening or early access
- Facility rental or free use

Finally, cause related benefits could also be offered. This takes more effort than other benefits and needs some planning and coordination with other organisations and businesses. For example, discounts can be arranged with businesses related to your cause i.e. discount with outdoor clothing store if you are involved with outdoor activities, arrangements with local retailers who sell products and services related to what you do. This is also a way of involving local business in supporting your organisation and can be sold on the basis of them having access to new customers. An example of this is when you join the RSPB as a member, you are offered special promotions and discounts for solar heating and sustainable energy related products. This is related to their 'cause' – creating a sustainable environment and also benefits their members.

A long-term benefit of having members and friends is that this is your base for other ways of generating individual support. These people can be asked for donations on top

of their membership, canvassed for legacies and are first stop for event audiences and sales of goods and services that you may develop.

### **Case Study**

The Isle of Gigha Trust was formed in March 2002 when the island residents were able to purchase the island with assistance from The Scottish Land Fund, the New Opportunities Fund and Highland and Islands Enterprise. At that time, all residents over 18 became members of the Trust and are now eligible to elect representatives to sit on a board of directors on a rotating basis. Gigha is located a few miles off the western coast of the Argyll peninsula and presently has 125 residents.

Shortly after the buyout, The Friends of Gigha was launched. (this was established as a Friend's scheme as membership was determined by the Trust's constitution) The Friends are composed mainly of former donors from the buyout and visitors to the Island. Benefits to Friends include:

- Two players for the price of one on the Golf Course
- Two adults for the price of one in the gardens
- Two for the price of one bike hire at the Isle of Gigha Hotel
- 10% discount on all the Isle of Gigha Heritage Trust Merchandise
- Membership Card
- Quarterly Newsletters and Christmas Card
- Letter from Pupil at Gigha Primary (for children only)

The Trust hopes to generate up to £10,000 per year from the scheme.

### **Other forms of giving**

In addition to gift aid and payroll giving – individuals can also gift shares, securities and buildings or property and other assets to your organisation. There is a tax benefit to the individual especially if they are in a higher tax bracket. Both you and any individual considering this should consult Inland Revenue for the details, as there are some restrictions.

## **C. THE LOTTERY**

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There are a number of different sources of funding available through the National Lottery programmes. These change their guidelines and criteria periodically to respond to need. The following are summaries of the current programmes in 2006 to give you an idea of the type of work that is supported.

### **Awards for All (A4A)**

Awards for All Scotland is supported by the Scottish Arts Council, the Heritage Lottery Fund, sportscotland and the Big Lottery Fund.

Current grants are between £500 and £10,000 for people to take part in art, sport, heritage and community activities, and projects that promote education, the environment and health in the local community.

Application packs are available to download from the website or by calling the Application Line (see appendix). The application form itself is short and easy to fill in. In addition, there are no deadlines, there are no themes (there are, however, guidelines) and you get an answer quickly – usually within eight weeks. The main restriction is that the grant needs to be spent within one year of payment. The application pack gives details of the other restrictions (e.g. ongoing rent or staff costs will not be supported).

Many small organisations have used this money to get themselves up and running or to strengthen their internal organisation. Groups can re-apply to this programme, for a maximum of £10,000 in any 12-month period. Several grants can be held at the same time for different work.

#### **CASE STUDY – AWARDS FOR ALL**

A small voluntary local history society (with a constitution, bank, account but not a registered charity) had been documenting a local archaeological site for several years. They wished to publish their findings but needed to date some of the remains on the site. They successfully applied for funding to radiocarbon date the objects and write up, publish and distribute their findings. This was made widely available to local people who had been actively involved with the conservation, preservation and interpretation of a local site of interest.

### **The Big Lottery**

#### *General information*

Staff are quite helpful to smaller organisations and will generally encourage you to apply. There are a few things you need to consider, however. This is one source funding – what will you do when the grant has run out? All proposals will be expected to show viable plans for sustainability after the funds are finished.

Many applications are turned down simply because organisations ask for too much, especially when related to the size of their organisation. Think about what you need, not what you can get.

Starting in 2006 The Big Lottery Fund in Scotland has £257 million to spend between 2006 -09. The information below outlines the current programmes and strands in each area. It is important to check the current information for updates and closing dates as well as any changes to the criteria.

### **Investing in Communities**

Growing Community Assets through which funding will help communities become stronger by acquiring or developing assets for their own use.

Dynamic Inclusive Communities through which funding will help build stronger more vibrant communities

Life Transitions through which support will be given to projects that help people deal with change in their lives and encourage them to move on.

Supporting 21st Century Life through which investment will be made in projects that enable people to cope with new patterns of life and the pace of change communities are experiencing.

A wide range of groups can apply including charities, voluntary and community groups, local authorities, social enterprises or health boards. Most of the grants are expected to be between £10,000 and £1 million. There is a short (6 page) outline application that must be submitted for approval before a full application can be filled out.

### **Investing in Ideas**

This consists of £4.6 million to test and develop ideas that could eventually become fully-fledged projects. Grants ranging between £500 and £5000 (possibly going up to £10,000 in the future) and will fund things like:

- market research
- feasibility studies
- business planning
- training for management committees
- exchange visits in the UK to see how other projects work
- community consultation
- professional advice
- technical reports and scheme design studies

### **Green Spaces Scottish Land Fund Scheme**

This fund will disperse around 15 million pounds and is still being defined. It provisionally will consist of three strands which will assist communities to plan and prepare bids to acquire/manage land and land assets; to acquire land; to undertake land development opportunities. The present award partners are Highlands & Islands Enterprise & Scottish Enterprise. Community based organisations are able to apply for funding. New details are currently being decided.

### **The Young People's Fund**

This strand is a £20 million grant programme to help young people aged 11-25 learn new things and take part in healthy and positive activities that make them feel good about themselves. The Fund states that most of the money will be used to fund projects in local areas that address important local issues. It can also be used to fund new ideas



or projects that cover more than one local authority area, involving groups of young people who share common concerns, experiences or issues.

Groups can apply for grants ranging between £5,000 and £1 million, spread over one to four years. Individuals are not eligible for funding but different kinds of organisations can apply including community or voluntary organisations, charities, limited companies and statutory bodies such as local authorities or community councils.

### **The Scottish Arts Council**

In 2003 the Scottish Arts Council conducted a public consultation on its strategy for lottery-funded arts and the results were subsequently incorporated into a corporate plan. There are four key priorities for 2004 - 2009:

- making the arts available to those who have had few or no opportunities to appreciate them
- increasing the numbers and broadening the range of people enjoying and taking part in the arts
- increasing arts activity for and by children and young people
- making sure there is a fair geographic spread of buildings, facilities and activities across Scotland.

There is a grant programme supporting individuals working at a professional level in the arts. The applicants must be based in Scotland and there are a number of other criteria which are outlined on their website (see resources section)

Only organisations that are formally constituted and have a commitment to Equal Opportunities are eligible to apply for funding.

In order to demonstrate accountability for public funds, all participants are required to provide evidence of their legal and financial status, usually in the form of a written constitution and audited accounts. The type of constitution document will depend on the type of organisation, but should clearly describe how the organisation is structured and managed, including how it will deal with financial matters. It should be appropriately authenticated with signatures and dates.

Types of organisations which are eligible:

You should primarily be an arts organisation, though The Arts Council welcomes applications from a wide range of other organisations seeking funding for arts activity, such as:

- Local authorities, registered charities and other organisations which cannot distribute profits
- Public sector agencies, if the arts activity is outwith their day to day work.
- Schools, if the arts activity is clearly outwith the normal curriculum, and there is significant professional artistic input which will result in production of new work, as well as clear public benefit. Annual school productions are not eligible for funding.

- Artists' groups may apply, as long as they are already established with an appropriate management structure in place, a written constitution, and dedicated banking arrangements.
- Commercial organisations, but only if they can clearly show that the project will promote the public good and not be for private or commercial gain.
- Sole traders are not excluded from applying, but you must show that the project will promote the public good and will not be for private or commercial gain.
- Groups of organisations (consortia) working together may apply. If you apply as a consortium, you will need to provide a formal consortium agreement.
- Joint applications can also be made, but one of the organisations involved will need to take the lead and have the main responsibility for managing the application and any grant. You will need to provide a partnership agreement.

The project must take place in Scotland.

### **Heritage Lottery Fund (HLF)**

HLF uses money raised by the National Lottery to improve the quality of life by safeguarding and enhancing the heritage of buildings, objects and the environment, whether man-made or natural, which have been important in the formation of the character and identity of the United Kingdom, assisting people to appreciate and enjoy their heritage and allowing them to hand it on in good heart to future generations.

HLF can give capital and revenue grants for projects relating to natural habitats and countryside, urban green spaces (including parks), archaeological projects, historic buildings and sites (including townscapes and places of worship), museum collections, historic library collections (including photographic, sound and film archives) and industrial, transport and maritime heritage. These must be of outstanding interest and importance at a local, regional or national level. See appendix for contact details.

### **sportscotland**

Set up by Royal Charter in 1972 as the Scottish Sports Council, the name changed to **sportscotland** in 1999. **sportscotland** is the national agency dedicated to promoting sporting opportunities for all Scots at all levels, whatever their interest and ability. The agency invests an annual Scottish Executive grant of around £12 million in a range of programmes designed to benefit all levels of sport - from a child getting their first taste of physical activity at school, to an international athlete competing for a gold medal. The agency also makes awards totalling approximately £22 million each year from National Lottery funds to help create links between schools and communities and to support areas and groups traditionally deprived of sporting opportunities. Eligible organisations and individuals can apply for a variety of awards to help purchase equipment, stage events, improve facilities, finance coaching etc.

**sportscotland** also administers the Sportsmatch scheme on behalf of the Scottish Executive. This is designed to act as an incentive for businesses to sponsor sport in Scotland by matching sponsorship fees on a £ for £ basis (minimum award £500). The scheme supports projects that demonstrate clear sports development objectives at

grass roots level, i.e. where the project encourages participation at community level, especially of youth groups. See appendix for contact details.

### **Guidance on applying**

Current information on all of these funding sources is usually available in a variety of formats (e.g. telephone helplines, websites, large print, information officers - see appendix). Some Local Authorities have Lottery liaison officers from whom you can seek advice. All of the Lottery Distributing Boards provide comprehensive guidelines and application forms, both pre-printed and to be downloaded from the Internet.

The general themes and application procedures of each Lottery Distributing Board change periodically and, although there are no specific deadlines stated for Awards for All and the Big Lottery, it is worth contacting their offices to find out when they will be assessing applications.

A clear and well thought out equal opportunities statement is essential for a successful application to any of the Lottery Distributing Boards. It needs to be proactive, not just a statement of equal access. It is worth looking at a variety of other organisations' statements in this area and checking with the local authority about their guidelines.

The first thing a Lottery assessor will look at is how your organisation's proposal fits with their guidelines. There is a fair amount of work needed to fill in an application (with the exception of the user-friendly Awards for All application form). Do not waste both your time and theirs with an inappropriate proposal.

If you are working with other groups, mention it – collaboration, cooperation and avoiding duplication of services are key concerns of all the Lottery Distributing Boards.

You will be asked for references from people outside your organisation. Make sure you have contacted them in advance to ensure that they are willing to be referees and that they are well informed about your proposal and organisation.

Make sure you keep a copy of the completed application form on file. Usually an assessor will call or visit as part of the assessment process. It will be embarrassing (if not fatal) if you cannot remember exactly what you've said!

Keep a file on hand of all relevant back up materials to your proposal. Do not send any attachments or extra materials that are not specifically asked for. They will not be looked at and will only annoy the assessor. If more information is needed, they will tell you.

## **d. TRUSTS**

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The type of trusts in which fundraisers are most interested are grant making trusts, managed by voluntary Trustees. In most cases, the Trustees are the actual administrators as well. It is only the very large trusts, which have paid staff.

A foundation is a form of trust. Not all trusts or foundations give funds to outside bodies. They may have been established to only support their own work e.g. the National Trust for Scotland. These trusts may be listed in a directory, but may not actually give away any funds. There are 5 main types of grant making trusts:

- Individual / Family / Private - set up as a way for a wealthy individual or family to practice philanthropy. These trusts usually have a strong philosophy of giving based on the personal values, views and interests of the founder(s). Examples include The Cadbury Trusts (whose founders had strong Quaker backgrounds, therefore interested in peace and social justice), Leverhulme Trust (research and education) and The Carnegie United Kingdom Trust (based in Scotland, which was the home of the founder), which is interested in education and projects in rural areas.
- Institutional - founded from an act of Parliament, Royal Charter or Livery Company. Examples include The Goldsmiths' Company's Charities and The Mercers' Charitable Foundation.
- Governmental - set up by the government or with a grant from the government. Examples include The Architectural Fund, the National Heritage Memorial Fund and The Foundation for Sport and the Arts. In Scotland one example is the Voluntary Action Fund set up with funding from the Scottish Executive.
- Corporate - established by companies by transferring shares or capital to trustees to be used for charitable purposes. Examples include The Wellcome Trust (Wellcome Pharmaceuticals), The Baring Foundation (Barings Bank) and The Lloyds TSB Foundation for Scotland (Lloyds TSB Bank). These are usually independent from the company and may not reflect the corporate donations policy of the company itself.
- Fundraising - these are trusts set up to raise funds and then distribute them to other charities. Examples include Comic Relief (Red Nose Day) and BBC Children in Need. They usually have an application form and most recently have developed policies on spending the money in the area in which it was raised. Community trusts (e.g. the Scottish Community Foundation) are also examples of this type of fundraising trust, where individuals, local companies and others can channel money tax-effectively to groups in the local area.

The Association of Charitable Foundations (see appendix) is the umbrella organisation that promotes the effectiveness of UK grant making trusts. It defines the special role of grant making trusts in the following way and makes these points about where trusts tend to concentrate their funding:

- Organisations that focus on new method of tackling problems.
- Disadvantaged and minority groups that have had trouble using ordinary services or which are inadequately served by them.
- Responses to new or newly discovered needs and problems.

- Work that is hard to finance through conventional funding.
- One-off purchases or projects.
- Short and medium term work which is likely to bring about a long term benefit and / or attract long term funding from other sources.
- Core funding is not always ruled out, but is not usually supported unless it falls under one or more of the above areas.

Trusts also have a variety of mechanisms for giving:

- Single payments or one-off grants in response to major appeals.
- Special relationship payments to the same charities each year.
- Grants over a stated period (usually not over three years) to a specific, costed project.
- One-off grants to small or large projects (not appeals).
- Pump-priming to provide starter money for a project (one to three years).
- Matching funding for a government, EU or Lottery grant (the Big Lottery and Awards for All do not require matching funding – the Heritage Lottery Fund , for instance does).
- Emergency support in cases of special need (e.g. natural disaster, war, famine relief) or sudden loss of funding.

Points to consider:

- Trusts are not the best funders for salaries or ongoing costs unless the salary is directly related to the project.
- Three year funding is a long time for most trusts.
- Projects are usually the best bet.
- Once a relationship is formed, a trust will often support continuing projects in the same vein or area but may need a year or so 'rest' before you approach them again.
- Most trusts give small grants. Only about 10% of all trusts give large grants i.e. over £10,000.

Many trusts say they give money UK-wide or in Britain. In reality, this often really means England. Find out if they have a track record in Scotland and if they don't it's unlikely you will be the exception. One of the aims of the Scottish Grant Making Trusts Group (see appendix) is to link with more with UK-wide trusts to keep them well informed of developments in the Scottish voluntary sector and encourage them to support groups working and based in Scotland.

Trusts may give away millions of pounds each year and have supported projects similar to yours in the past, however you need to find out what percentage of a trust's overall expenditure actually goes to the area of work you are engaged in. Some trusts state this, others don't. The amount available for your work may in fact be only a small percentage of the total. Is this in line with what you are asking for?

Allow at least nine months to a year from when you submit the application to when you bank the cheque. Trusts are not a rapid response form of funding and don't usually respond to emergency funding (emergency relief due to war, natural disasters and famine appeals are possible exceptions).

Do your research! The various directories of grant making trusts are valuable resources to find out what is known about a trust already (e.g. its guidelines, application procedure, examples of grants made, annual grants total). However, you can start closer to home by getting a hold of Annual Reports from organisations doing similar or complimentary work to yours to see which trusts have supported them. Another source of trust information is from lawyers – many of whom administer more local trusts and may have information that is not available in the standard reference books. A lawyer on your management committee can be useful for contacts in this area.

Research is easier to do in small batches. Select up to 10 trusts to look up at a time. Pay very close attention to the guidelines - see which projects the trust has given to before and how much has been donated. How does this relate to your project(s)? Are you asking for an appropriate amount of money? There is no point in asking for £10,000 when the trust's average grant is £500. The following page shows a typical trust entry in a directory.

**Example of a typical trust entry in a directory:**

**THE GOOD WORKS TRUST**

**Established:** 1951

**Scottish Charity Number:** SC012345

**Correspondent:** Mr Goodcause, Trustee, The Good Works Trust, 100 High Street, Any Town, Scotland AB1 2YZ (tel: 0141 300 4000)

**Trustees:** Lord Good, Mrs Great, Miss Plenty

**Objects:** Relief of poverty, support for left-handed violinists in Aberdeen, charities the trust has special knowledge of.

**Beneficial Area:** Scotland, with a preference for Aberdeen.

**Policy of the Trustees:** To support causes connected with the founder, and other charities in the area of his birth (Aberdeen).

**Exclusions:** No support is given for advertising, capital improvements or capital campaigns. No grants are given outside Scotland.

**Finances:** Year ending 31 March 2006

Income: £345,000

Grants: £328,000

Assets: £4,555,000

**Type of grants:** One-off to individuals, recurring grants (up to three years) for charities.

**Type of beneficiary:** A variety of small, local charities and a few national bodies have been supported, including:

Heating Fund for the Aged - £600

Arts United, Stonehaven - £350

Help the Aged - £1,500

Aberdeen Student Orchestra - £800

Alzheimer's Scotland - £500

Good Care Hospice - £1,150

The Music Centre - £200

The Bird Reserve - £8,000

Shelter - £450

The Comfort Day Centre - £900

**Applications:** In writing to the correspondent. Applications accepted in May and February for Trustee meetings in July and April.

How to read and interpret an entry in a directory for a Trust:

- Correspondent's name - avoid Dear Sir or Madam letters
- Is the address up to date?
- Telephone / fax number given? If so, you can call to clarify the guidelines first.
- Trustees - do you or any member of your organisation know any of them? It is not politic to approach them directly for money, however it is fine to let them know you are applying. Look them up in Who's Who to get more of an insight about interests and possible local connections.
- Objects of trust - these set out priorities for funding. Read them carefully to see if you fit into the areas of giving. They usually refer to the constitution of the trust.
- Policy - this part often expands on the objects section.
- Exclusions - make sure you read these carefully. It's unlikely they will make an exception for you no matter how important or interesting your work is.
- Beneficial area - do you work in, or benefit people in, this area? If the trust says only local applications, it means it!
- Finances - this section usually gives the trust's income, how much was given out in grants and an indication of the trust's assets (e.g. reserves and / or investments).
- Type of beneficiary - i.e. charities, individuals etc.
- Type of grant - this will specify whether the trust will support capital, revenue, one-off or recurrent grants. Again make sure you fit!
- Deadlines and other requirements - read this carefully as some trusts meet quarterly, others only once a year. How does this fit into your financial needs? You may have to plan up to 6 months in advance in order to meet their deadlines. Make sure that you send Annual Accounts and / or Annual Report if it is requested. Do not send anything that is not specifically asked for.

### **Follow up**

If you do receive funding, say thank you immediately! A surprising number of trusts report the failure of organisations to do this. Also, make sure you fulfil any monitoring, evaluation and reporting requirements. You may be able to approach the trust again for further funding at a later date. Keeping a good relationship is essential.

If you are turned down by a trust, try and find out why. It can be a painful phone call, but may give you clues as to any weakness in your approach. Don't press if they do not want to talk to you. Don't whine, but explain that you want to learn from your mistakes and / or better understand the guidelines. Ask if it is worth applying again.

A final note about potential trust funders - although they all have different criteria and guidelines for what they support, there are some common concerns that you need to take account of. These concerns can be summed up in the list below.

Funders and supporters will want to know if your work:

- Has a long term benefit - known as 'bang for the buck'!
- Builds the capacity of the organisation.



- Involves a wide range of stakeholders.
- Involves minorities and can demonstrate equal opportunities.
- Helps develop new leaders.
- Creates new and sustainable community resources.
- Maximises use of other resources.
- Promotes new partnerships and working relationships.
- Is clearly linked to internal organisational goals that will support future work.
- Influences public policy.
- Influences and educates the public.
- Leads to a visible victory for your constituency.
- Builds on local and / or national campaigns.
- Attracts other investors.

Use these issues as additional selling points in your application.

### **Special Fundraising and grant distributing Trusts**

There are three Trusts that are worth a special mention as they distribute funds in Scotland on a regular basis and have clear forms to fill out as well as easily accessible guidelines. They are all fundraising and fund distributing bodies: Comic Relief, Children in Need and the Scottish Community Foundation.

### **Comic Relief**

Red Nose Day Grants are the main set of grants available to UK based charities for work in the UK. These grants come from some of the money raised from Red Nose Day. There is also a separate International programme set of grants for UK based organisations working in partnership with overseas projects. Each programme has an application form available on line. Sports Relief, a separate Comic Relief grants programme is available through the Scottish Community Foundation, who acts as their distributor in Scotland.

During 2005-08 there are 6 distinct UK programme areas to apply to: Young people, Older People, Mental Health, Refugees & Asylum Seekers, Domestic Violence, Disadvantaged Communities. They are open on a rotating basis, each with their own criteria.

The overall grant-making aims are to:

- reach people in great need;
- meet people's needs and ambitions, and promote their rights;
- help people to live with dignity and free from fear;
- tackle some of the root causes of poverty and injustice; and
- bring about lasting improvements in the lives of poor and disadvantaged people.

Comic Relief can give grants for running costs and capital costs, depending on the programme you are applying to. Running cost can include rent, salaries, heating and lighting. Capital costs can include equipment costs (for example, computers and office furniture); and building costs. These are usually one-off payments. Comic Relief gives building costs a very low priority, and only fund these expenses in exceptional circumstances. They do not fund capital costs where they are part of a much larger appeal.

There is no maximum grant size and the amount you ask for should be the amount you need. They are likely to make some large grants, and a range of smaller grants of between £15,000 and £30,000 each year. If you want to apply for more than £100,000 in total, then an initial phone call is required before you apply.

Each programme area has a small fast track grants programme (under £5,000) and a larger grants programme. There are 4 grant deadlines spread through 2006, with the 2007 set of deadlines announced at the end of 2006. There is an on-line assessment to fill out to determine if you are eligible to apply. (see Appendix for contact details)

### **Children in Need**

Applications are usually accepted in March and November of each year with a reply in 4-5 months, so planning ahead is essential. The criteria for 2005-6 were aimed at organisations working with disadvantaged children and young people 18 years and under, living in the United Kingdom. Grants were given to tackle disadvantage including: illness, distress, abuse or neglect, any kind of disability, behavioural or psychological difficulties, and projects addressing children living in poverty or situations of deprivation.

In order to meet the Trust's criteria organisations must have their own bank/building society account, have at least two cheque signatories and be not for profit. The application should demonstrate how the project would change the lives of children and young people for the better. It should be entirely focused on them. Where possible and appropriate it should take into account their views and involve the users in decision-making. In addition, applicant groups should have a constitution or a governing document, have a written Child Protection Policy and have adequate and appropriate insurance.

Grants can be awarded for up to three years at a time, but Children in Need only give one year grants for capital projects, seasonal projects e.g. holiday play schemes, holidays and outings, equipment & welfare funds. Organisations may hold only one

grant at a time including organisations with dependent branches. (see Appendix for contact details)

### **The Scottish Community Foundation**

The Scottish Community Foundation was established in 1996. They manage over 200 charitable funds from individuals and companies in Scotland.

Existing grant giving Funds include:

#### **One City Trust**

Grants from One City are made to organisations or projects specifically working at grassroots level to promote inclusion through self-help, training and development.

#### **Women's Fund**

When women's organisations are well funded the whole community benefits. The Woman's Fund for Scotland exists to reach out to women everywhere, to bring them together and help them help themselves.

#### **Gordon Brown Memorial Fund**

Formally launched at a Barbarians match in 2001, The Gordon Brown Memorial Fund is a means by in which kindred spirits can remember him through their contributions.

#### **June Hume Memorial Fund**

In her name husband Douglas Hume set up 'The June Hume Memorial Fund' to support terminally ill individuals in Scotland, who wish to remain in their own homes throughout their illness.

#### **The Sportsman's Charity**

The Sportsman's charity in partnership with individuals, charities and the corporate sector aims to generate funds for charitable purposes.

#### **Kinross-shire Fund**

The Kinross-shire Fund is dedicated to improving the quality of life of everyone who lives in the Kinross-shire community addressing local issues such as supporting the elderly and young people, community infrastructure and regeneration.

In addition there is a small grants programme (£1000 or under) and a main grants programme (up to £5000) with no deadlines. Applications can be downloaded from their website [www.scottishcf.org.uk](http://www.scottishcf.org.uk). This is an ideal source for smaller community based organisations as the application form is straightforward and the turn around time for grants is shorter than most funders (2 months).

## **e. PUBLIC FUNDING**

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### **Scottish Executive**

The main priorities of the Scottish Executive reflect current government objectives and are usually focused on national projects that benefit large numbers of people. Only on an **exceptional basis** will funding be made available for local service delivery organisations (public sector funding for local organisations is expected to come from

other agencies, such as local authorities, health boards, local enterprise companies and some non-departmental public bodies).

In line with best practice in the strategic funding of voluntary organisations, Scottish Executive funding is available:

- For activities that promote Scottish Executive objectives.
- To support capacity building within organisations on the basis of agreed outputs.
- To fund core management, administrative and relevant training costs where an organisation has a continuing role in the delivery of particular policy objectives.
- For national generic infrastructure organisations and associated local networks to promote the growth and effectiveness of voluntary and community organisations.
- On a time-limited basis, for innovative projects where the Scottish Executive has a particular interest in taking forward an experimental approach.

The Scottish Executive's Voluntary Issues Unit (VIU) publishes an information leaflet giving brief details of the different grants available – see appendix. There are usually forms and application procedures to follow. Although this can be a bureaucratic and time-consuming process, there are usually clear guidelines and helpful people to discuss your questions with. As this is public money, you will be expected to be able to fully account for your work, produce evaluation and monitoring schemes and have measurable outcomes.

Some examples of grants available directly from the Scottish Executive in 2005/06 include:

### **Unified Fund**

The Children, Young People & Families Unified Voluntary Sector Fund - grant support for voluntary organisations to provide better outcomes for children, young people and families. Applications for funding under the unified scheme should be in support of one or more of Ministers' priorities for children, young people and families, including:

- to deliver better outcomes for vulnerable and deprived children and young people
- to protect children - through effective early intervention with children and families and/or support when they need protection;
- to improve the health, education and care of children and young people who are affected by disability and/or who have special educational needs/additional support needs
- to assist in meeting the health needs of children and young people by engaging in health initiatives complementary to those required by statute
- to deliver better outcomes for children, young people and families from ethnic minorities to promote the rights and reflect the views of all children and young people - especially those who are vulnerable or deprived
- to enhance the physical, mental and emotional development and well-being of all children and young people by promoting healthier, more positive lifestyles through social inclusion, lifelong learning and active citizenship

- to provide mediation and counselling services for families/couples experiencing stress or in transition.

**Youth Work** - Headquarters grant provides assistance to national voluntary youth organisations with the cost of maintaining a Scottish headquarters. Project grants may be provided for national projects that test innovative ideas of wider significance or local projects that are innovative and of potential national significance.

Priorities include: engaging with young people to facilitate their personal, social and educational development and enable them to gain a voice, influence and place in society.

**Rural Community Transport Initiative**- Promotes community transport schemes in rural areas. Services can include community minibuses, car schemes, dial-a-bus, dial-a-journey and community ferries.

### **Volunteering -Scottish Executive Volunteering Strategy**

Grants are available for up to three years for projects that directly support the implementation of the Scottish Executive Volunteering Strategy. Grants will only be provided to organisations that can demonstrate that what they propose would help to deliver the strategy by providing projects that can support the volunteering sector to deliver the strategy such as new practice, resources, models etc. Projects should impact at a national level.

**Valuing Volunteers** A Small Grants Scheme administered on behalf of the Scottish Executive by the Voluntary Action Fund (VAF), primarily aimed at local voluntary organisations and community groups.

### **Funding available from the Regeneration Budget**

The Regeneration programme in 2005/06 totals £117 million and the major element of this is the Community Regeneration Fund grant, which amounts to £85 million. This money will be used by all 32 Community Planning Partnerships to enable them to deliver the outcomes specified in their individual Regeneration Outcome Agreements. This will replace SIPs funding. Resources also support Community Engagement, Wider Role for Registered Social Landlords, Community Learning and Development, Adult Literacies, and local regeneration projects through the Scottish Centre for Regeneration. Many grant mechanisms are distributed through Communities Scotland's network of seven local area offices in Edinburgh, Glasgow, Dundee, Hamilton, Paisley, Inverness and Aberdeen.

**New Ideas Fund** (Scottish Centre for Regeneration) - Grants of up to £5,000 to community or voluntary groups in disadvantaged areas to assess the feasibility of new ideas and develop and build support for new and innovative approaches to regeneration. Distributed via the agency's area network.

**Seeing is Believing Fund** (Scottish Centre for Regeneration)-Grants of £50 to £5,000 to community or voluntary groups in disadvantaged areas so they can visit and learn from successful regeneration projects. Distributed via the agency's area network.

**Communities Scotland's Other Programme Initiatives-**

Scottish Community Action Research Fund- Grants to support community groups and other eligible organisations to carry out research projects in line with Communities Scotland's remit. Distributed centrally via the Research team within Knowledge and Intelligence.

Stage 1 grants - up to £1,650    Stage 2 grants - up to £10,000

**Social and Environmental Grants** - Area teams also have access to the SEG's fund of approximately £8 million for the whole agency. Resources can be used to fund the cost of social and environmental facilities within housing developments and also some community facilities consistent with the determination. The key factor, as with the external grants, is that this resource is available only for housing-related activity.

**Homepoint Grants-** Homepoint at Communities Scotland provides grant support to projects in the field of information and advice. The purpose of the grant funding is to help applicants to develop and test ideas for delivery of information and advice services and to support good practice which can be promoted to other bodies. Of particular interest are projects which cater for the varying needs of a range of client groups.

**Futurebuilders** -Futurebuilders Scotland is an investment programme to help social economy organisations that provide services to the public. The programme invests in organisations that are working to achieve the Scottish Executive's 'Closing the Opportunity Gap' objectives and targets; - to deliver services to the public; and to increase their financial sustainability.

There are three Futurebuilders Scotland Funds -Investment, Seedcorn and Learning - which can offer grants of varying amounts dependent on the fund applied for.

**International Development Fund:** Main Grants Scheme. Grants are available to Scottish based organisations carrying out international development work, which complements the Scottish Executive's international development policy. Grants between £20,000 and £250,000 are available for work reflecting the priority areas of education, health (including HIV/ AIDS and water), and civil society development/governance. The geographic priorities for the fund are sub-Saharan Africa, in particular Malawi, and the countries affected by the Asian tsunami. The scheme encourages work that effectively meets locally identified needs, and demonstrates positive outcomes that will be sustainable beyond the life of the project.

**Community Care** -Grants are available to assist voluntary organisations in developing social work services and promoting social welfare. Core, capital and project funding is given to assist national organisations whose activities deliver services in support of Executive objectives in priority areas of community care. Local projects which are innovative and of potential national significance may also be considered.

**Older People** -Schemes for Community Facilities. Grants are for capital and revenue costs but for the most part will only cover 50% of the total costs and therefore require matching funds.

**Sustainable Action Fund** - £275,000 a year is available to support innovative projects by organisations which promote sustainable development in Scotland.

**Health Grants** – grants are available to national voluntary organisations engaged in health initiatives in Scotland, complementary to those required by statute. These can contribute towards the administrative costs of running the organisation headquarters and, occasionally, to fund specific innovative projects and capital needs.

There are other direct grant programmes for voluntary organisations. Information on these funds can be accessed through “A Guide for the Voluntary Sector to Scottish Executive Grants” available on the Executive’s website (see appendix).

In addition to direct grant programmes, there are also indirect programmes, where the Scottish Executive gives block grants to quangos (non-departmental public bodies) and other organisations such as Victim Support Scotland. These devolved grant makers have their own application forms and guidelines.

The major Scottish quangos that have accessible and defined grant programmes are:

### **Historic Scotland**

Historic Scotland (see appendix) is an Agency within the Scottish Executive responsible to Scottish Ministers for safeguarding the nation's built heritage and promoting its understanding and enjoyment. Grants of up to 50% of total costs are available to assist voluntary bodies to improve their effectiveness in carrying out practical work on historic buildings, archaeology and designed landscapes (including practical environmental conservation or improvement work, technical, educational or training activities, and coordination of bodies carrying out environmental conservation or improvement work).

Financial help is available to owners in both the private and public sectors (home owners, trusts, commercial undertakings, local authorities) to meet the cost of high-quality repairs. Historic Scotland promotes the use of traditional materials and specialist craftsman to conserve original features in buildings of special architectural or historic interest. In return, owners must insure and maintain the building and allow some access to visitors.

Criteria for awarding grants:

Applications are invited quarterly, at the end of January, May and September with decisions being notified within 2 months of the respective closing date. There are a number of criteria which have to be met before an award can be considered.

- The building must be of sufficient outstanding architectural or historic interest.
- The building must be at serious risk from neglect or repair.
- A need for grant for repairs to be undertaken must be demonstrated.

Assessment of applications is a competitive process that also takes account of any wider benefits that the repair project may provide, such as:

- benefits for communities
- promotion of quality and development of knowledge and skills

Grants are not available for routine maintenance and minor repairs, or for the repair or installation of services. Any work of addition, alteration or demolition also does not qualify for grant.

### **Scottish Natural Heritage (SNH)**

SNH delivers their grants through eight new grant schemes.

In Autumn 2005 changes were introduced in how they assess applications for grants. If you are seeking a grant of less than £10,000, you can continue to apply at any time.

SNH will assess applications for contributions of £10,000 or more in two competitive funding rounds each year. The closing dates will be 15 April and 1 September each year. It is important to send in applications well before the closing date to give you time to provide any additional information that they may ask you for before the closing date. Current programmes include:

- Special places - Managing special places to protect and improve their natural, wildlife and scenic qualities.
- Supporting biodiversity - Promoting, protecting and improving biodiversity.
- Enjoying Scotland's outdoors - Activities to raise awareness and understanding of the new access rights and responsibilities, and the Scottish Outdoor Access Code.
- Paths and routes - Developing paths and routes which help more people to get out and enjoy the natural heritage.
- Attractive places to live - Activities to improve the quantity, quality and accessibility of green space in and around our towns and cities, and to involve communities in planning and managing them.
- Involving people - Activities to raise awareness and understanding of the natural heritage and to encourage more people to be involved with the natural heritage.
- Rural land use - today for tomorrow - Promoting sustainable approaches to land management in farming, forestry and moorland, and developing new techniques and approaches to tackle issues affecting their use and management.
- Waters for life - Promoting sustainable approaches to managing freshwaters, coasts and seas, and developing new techniques and approaches to tackle issues affecting their use and management.

### **Other Quangos / NDPBs**

A list of over 40 other NDPBs (both national and regional) is available from the Scottish Executive. Some of these bodies give to charities, but not all are open and accessible. This is an area of funding where research is key. Start with a personal contact if you can - a local councillor is a good place to start.



### **Local Authorities**

This is an area of funding that is difficult to make generalisations about. Each authority will have variety of departments to contact and different schemes in operation. Some have centralised the process and there will be one form to fill out for everything. (eg Fife has a comprehensive and well spelt out policy with defined grant areas). It is worth checking specific departments like Recreation Department (sometimes called Leisure), Education and other areas like Planning. They all have their own budgets and criteria for what they will support. Also, investigate specialist Committees / Departments e.g. Environment, Arts, Women. Get a local councillor on your management committee to help and advise you! This will not guarantee you get the funding but will help you navigate the choppy waters of local authority bureaucracy.

### **Health Boards**

There are some funds available for initiatives promoting health issues like balanced diet, immunisation and drug misuse. Local Health Boards will also support projects dealing with 'social exclusion' and groups at risk. There has to be a health connection of course, but this can be interpreted quite broadly. Contact your local area board for their current guidelines and discuss the type of work they have supported in the past. Contact groups who have received support from them in the past to see how it has worked out. Health Boards can play a key role in partnership funding. The appendix gives contact details of useful umbrella organisations and websites for further information.

### **Local Enterprise Companies (LECs)**

These organisations (regionally-based) are primarily interested in job creation, public / private partnership initiatives to do with economic development issues and training. The programmes vary from area to area, as does the budget. A personal contact is essential, as these funds are often used in partnership with local government or other statutory sources. Highlands and Islands Enterprise (see appendix) for example, assists voluntary sector led projects that contribute to community and cultural development. Scottish Enterprise (see appendix) and its associated LECs tend to have a purely economic perspective. In 2006 they will undergo a reorganisation and it is expected the priorities will be more defined and targeted to the areas of greatest need.

## **f. EUROPEAN FUNDING**

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There are a bewildering number of funding agencies and a variety of programmes in addition to funding available through the different objectives. The current programmes and guidelines are set until 2006 and the forms and guidelines can be accessed through the internet or by mail (see appendix). They can be quite daunting - many programmes require partnership funding from local and central government, while others need 2 or more partner organisations in other EC member countries.

Particular problems for many small to medium-sized organisations are that most European funding covers only a percentage (usually 50%) of a given project and payments are often retrospective (after you have spent it, you get the grant as a

reimbursement). If you do not have healthy financial reserves and a good cash flow, this can present problems. Another reason accessing this source of funding can be a serious undertaking for smaller groups is the time needed to fill out the application and the complex reporting requirements. This requires solid administrative support and good financial systems in place.

There are some ways around these problems. If you work in a consortium or get a grant from a larger group that has received EU money, the matching issue can be solved (as it has already been matched by the grant receiving body). Also, you can get the funding upfront rather than retrospectively. Most local government authorities employ a European Officer who can give current information and advice and help you find partners to work with.

European funding can be a fruitful avenue to pursue if you are looking for large sums i.e. over £100,000 and have a number of partners to work with. It is essential to get advice from successful applicants and to work closely with other organisations. Again, as this is not usually 100% funding, finding the match funding can often be difficult if you are not well connected into the local or regional networks. Some examples of current funding programmes include:

### **European Structural Funds**

The Structural Funds are designed to support regions which are less developed or are in industrial decline, and to support training schemes for unemployed and employed. The two main funds are the European Regional Development Fund (ERDF) and the European Social Fund (ESF). Both funds will part-fund your project offering up to 50% of the total cost.

ERDF can support both capital and revenue projects and focuses on economic development and community based regeneration, e.g. development of community based facilities. European Social Fund (ESF) can support training projects and often focuses on disadvantaged groups, e.g. IT skills for women returners or unemployed young people.

There are 5 Programmes operating across Scotland. Each Programme has its own rules and priorities for funding. Programme Management Executives or 'Partnerships' manage the Programmes and are a good source of information and advice. The Programme you apply to will depend on where you are based and the type of funding you require. The 5 programmes are:

- Highlands and Islands Special Transitional Programme
- South of Scotland Objective 2 Programme  
The South of Scotland Objective 2 Programme (covers Dumfries & Galloway and the Borders) offers ERDF support only

- **West of Scotland Objective 2 Programme**  
The Western Scotland Objective 2 Programme offers ERDF and some limited ESF support.
- **East of Scotland Objective 2 Programme**  
The East of Scotland Objective 2 Programme offers ERDF support only.
- **Scottish Objective 3 Programme and EQUAL**  
The Scottish Objective 3 Programme offers ESF support for an extensive range of training projects and training related activities. This Programme funds projects throughout Scotland with the exception of the Highlands & Islands region which has ESF support through its own Programme.

### **Key Funds in the West of Scotland**

Community organisations in some areas of the West of Scotland are able to access European funding using a simplified and speedier application process, through the 'Key Funds'. Key Funds are meant to help overcome the obstacles faced by community-based organisations when applying for European funding, namely:

- payment of grant in arrears.
- match funding, which requires organisations to secure other funding at an individual projects level.
- A lack of credit worthiness affecting both profit making start-up businesses and non-profit organisations.
- Lengthy and complicated administrative procedures that are off-putting to small organisations.

The main features of the Funds are:

- They target community-based organisations that have found it difficult to access Structural Fund support under the mainstream programme.
- Community groups must show how they will undertake one or more of the following: create jobs; organise and engage communities; get people to work and get people ready for work.
- Applicants will need to show that they have the support of other groups in their community and that activities will contribute to longer-term economic regeneration.

You can receive a grant to cover the whole cost of your project. However, it is expected that some form of commitment be provided through in-kind contributions.

Grants are available up to a maximum of £30,000. Payment of grant can be made in advance. Most Key Funds turn around applications in 6 to 8 weeks. This is the timescale from submitting an application to receiving a cheque.

Key Funds exist in parts of the following areas:

Glasgow  
North Lanarkshire  
Clyde  
Ayrshire

Funds have been fully committed in some areas, so it is best to check with your local Key Fund contact before proceeding.

### **LEADER+ Community Initiative**

LEADER+ is one of four Community Initiatives funded by the EU. It is financed through another of the Structural Funds, the European Agricultural Guidance and Guarantee Fund (EAGGF). The overall objective is to encourage strategies for integrated sustainable development of rural areas. LEADER+ particularly focuses on: enhancing the natural and cultural heritage; contributing to job creation; and improving the organisational abilities of the local community.

There is a single LEADER+ programme for Scotland worth around £17m for the period 2000-2006. Projects may be funded up to 50% of total eligible costs (except in the Highlands & Islands where the limit is 75%). This may be extended beyond 2006.

## ***g.* COMPANIES**

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This is one of the hardest and most time-consuming sources to raise funds from. But there can be rewards for small and community-based organisations. The underlying principle of seeking company and business support is to make a good match of your project to their current agenda and interests. Your project may tie in with the interest of their customers, be related to the company's products and services, be related to the company employee needs and interests or be of personal interest to the founder / director of the company. Below are listed some other reasons why companies support charities:

- Ethos of company / social responsibility.
- Good public image.
- Business benefit.
- Benefit to the employees / meeting employee needs.
- Increased profile.
- Interest of Director / Director's partner.
- Team building.
- Local community relations.
- Increased sales.
- Peer group pressure.
- Investment for the future.
- Publicity.
- Tax advantages.

In order to be successful, you need to do your research carefully to find out exactly what the company is interested in. This will be different for every company and is best done by an 'insider' - a supporter or friend of your organisation who works for the company or knows people who work for the company.

Companies can provide support in a variety of different ways:

- Through grant making trusts set up to channel the company's donations to charities.
- Cash donations through local company branches and national headquarters.
- Employees can nominate a charity and have a designated amount deducted from their salary each month. This is known as payroll giving or Give As You Earn (see previous section) and has major tax advantages to both the individual and to the charity. Donations are deducted from an individual's pay before tax, so the charity gets more and it costs the donor less.
- Matching money raised / donated by employees for your organisation. Some companies will match the amount raised £ for £ (in some cases, to a fixed upper limit).
- Sponsorship e.g. of a specific event, project or publication. This is not the same as a direct cash donation. You will have to give something in return. This can take the form of raising the company's profile, providing their customers or employees with a direct benefit or helping to market or sell the company's products and services.
- A company's services and products can gain kudos by being associated with your cause. This is known as cause related marketing (CRM). Examples include Covent Garden Fresh Soups giving 5p per carton of soup sold to homeless causes and B&Q supporting Save the Rain Forest. This is a sophisticated marketing exercise and is usually arranged through Public Relations and Advertising agencies; however it can be tried on a smaller scale with a local company.
- Charities can now issue their own credit card through a number of different banks. These are known as affinity cards. Instead of the entire fee for the card going to the bank, a percentage of the total amount each cardholder is charged goes to the charity (about 2%). This produces income on a regular basis, however studies have indicated that the charity needs to have an uptake of at least 1,500 – 2,000 cards to make this worth the set up charges. This is clearly suitable for larger charities, but a number of groups might consider a joint venture e.g. a youth card or arts card.
- Through buying advertising space in an event programme.
- Donation of products e.g. computers, stationery supplies, food products, discount vouchers, prizes for raffles. InKind Direct and Grocery Aid are examples of schemes

set up to facilitate the donation of unused / surplus goods from businesses to charities and voluntary groups (see appendix).

- Provision of services e.g. printing, free rooms / venues for events, training.
- Personnel expertise to help with legal, financial, marketing, managerial or planning issues, either in the form of secondments or volunteers from their workforce.
- Running internal events to raise funds on your behalf e.g. company challenges, marathons, or on a smaller scale dress down days.

Total corporate support for charities in Scotland in 2005 was approximately £36 million. Of this total, it is estimated that £20 million was donations of cash and £16 million was in-kind support. This overall figure has not increased significantly in the past 5 years. Bear in mind that:

- 25 companies are responsible for 48% of all support UK wide – There are no specific figures for Scotland but only 3 of the top 25 companies are based in Scotland.
- Charities receive an average of 5% -7% of their income from companies.
- The average company sponsorship is worth £5,000.(This usually is for large well know 'national' charities)
- The average cash donation is £1,000.

All of these facts reinforce the idea that company support (at least in the cash area) is limited.

Here are some examples of the funding guidelines and levels of support from a few companies with headquarters in Scotland (2005):

**Scottish Power** - Total community contributions are stated at 4.3 million (includes in kind, secondment, non- charity support i.e. schools, commercial sport etc UK wide) 183,000.00 of which goes to specifically to charities. Scottish Power supports Arts, education, employability, community and Environment. Sponsorship is concentrated on National and International events and organisations. They receive between 40-50 sponsorship requests per month, 20% of which are successful. They have payroll giving and match employee contributions pound for pound.

**Royal Bank of Scotland** – 19.3 million in community donations and 14.7 million in cash (UK wide). RBOS supports Education, employment, enterprise, financial inclusion/education. Local organisations are mainly supported through employee led initiatives. In kind support includes mentoring through the Princes Trust Business mentoring programme, support for Young Enterprise Scotland and support for sport (6 Nations Rugby). They also run a programme for employees called 'Community cash back' where staff can apply for up to £1000 to be donated to an organisation they are

currently volunteering for. In addition, RBOS double matches any employee's charitable contribution i.e. an employee donates £25 and the bank will donate an additional £50.

**Grampian Holdings** – Total contributions £33,000. Supports children and youth, social welfare and medical and recreational causes. Grants are £250 to £5000 for national organisations, £100 to £2000 for local groups.

**Low and Bonar PLC** – Total contributions are £75,000. They support medical research, welfare of children and the elderly, care for the disabled and relief of human suffering in the Dundee and Tayside area.

First you need to obtain the company guidelines for giving (if they have any) to determine what areas of work the company supports. Start with the businesses local to your area, that employ a workforce that might be related to your aims and objectives or a company that you might be using as a supplier. Don't do a mass mailing - target your prospects carefully.

There are several different areas of a company that you can approach for support. The marketing department usually has the most money - far more than the donations department. The community relations department of large companies is also a good bet.

Again, person-to-person contact is always the most effective. If you know someone in the company (even if they are not the person to direct the enquiry to), talk to them first. Have them find out who the relevant person to contact is.

If possible, have your contact arrange a meeting and / or introduction. Ask if you can use their name if they can't / won't get involved directly (e.g. "Mr. Jones suggested I contact you to discuss a project we need support for"). Also, don't forget that interviewing for information is useful e.g. "If you are not interested, perhaps you could put me touch with / give me the name of someone who might be". Again, ask if you can use their name to get in the next door e.g. "I was speaking to Mr. Smith from company x and he suggested I talk to you about our project".

The next best technique to approach a business for support is by telephone. Here the trick is to get past the secretary. Their job is to screen calls, especially those that might be asking for money! Try to arrange a specific time or appointment to call back. Emphasise that the call will be brief (then stick to that promise).

It might be helpful to write yourself a script first. That will help you stick to your main points. Be clear what you want - ask for a face to face meeting if possible. If the person gives you information and / or is helpful, write a brief 'thank you' note immediately.

You will usually be asked to follow up your conversation with a written proposal. Do it promptly. Refer to the telephone conversation (e.g. 'I am following up on our conversation of Thursday the 23<sup>rd</sup> and enclose a proposal to ask for support of our project').

Don't forget to mention in the letter that you will be contacting them by telephone on a specific date to get feedback on the proposal. Then make sure you call them when you said you would (two weeks is a good amount of time to leave). Again try to arrange a face-to-face chat – it's always easier to sell face to face.

The third option (if you cannot make personal or telephone contact) is to seek funding and / or support through a letter or application. You may be referred to this method when you try face to face or telephone contact. It should be addressed to a named person if possible rather than a title or Dear Sir / Madam. Try and get as much information by phone as possible (preferred format, deadlines etc).

In your covering letter, explain why you are approaching this particular company. Explain your possible future relationship or what connection your project has to the company's products / services and employees. Again make a pitch to have a face to face meeting to discuss the proposal further. Invite them to visit your organisation to see the project in action.

As with all proposals, keep it short, precise and don't overburden the reader with a million enclosures. A covering letter, 2 sides of A4, a budget for the project, Annual report and perhaps relevant letters of support and / or newspaper clippings is more than adequate. More information can always be requested if needed.

If support is forthcoming, make sure the details are clear. It is useful to think about this like a business contract. When do you get the money? What are your obligations? Do you have to submit reports? Does the company want their logo or certain wording on materials you produce? Make sure you get the company approval if necessary on publicity. Make notes of news coverage and inform them of openings and launches that they might want to attend and most importantly, don't forget to say 'thank you'. If the proposal is turned down, try to find out why (without whining). The feedback may give you some important tips for future proposals.

A good place to start with developing relationships with companies and business is with in-kind requests. You can build on this once you have established contacts and a track record. Be creative with in-kind requests. Computer companies are besieged with begging letters for equipment - why not look to their other services / products and expertise that could be useful and may be equally valuable to your organisation. The list below outlines some general areas of need that many companies are often willing and able to contribute to:

- Financial services: accounting advice, book-keeping, strategic planning, investment advice, wages and retirement plans
- Legal services: general advice, setting up trusts, copyright issues, employment law
- Advertising and public relations: campaign advice, media contacts, graphic design
- Staff training: computer training, sales techniques, management skills
- Use of facilities and equipment: meeting rooms, space for special events, exhibitions and fundraisers, video equipment, in-house printing and copying facilities



- Food services: for clients, special events
- Transportation: the company may have vehicles available on certain days or at a discount
- Volunteers: opportunity for company to second specialist workers or interested individuals and make connections with the local community
- Discount vouchers or coupons for clients, staff (these may be for goods or services)

A survey done of UK companies who donate to charities indicated that:

- 75% gave away products or donated use of premises
- 25% of these also sell to charities at a discount
- 69% donated equipment and supplies
- 38% donated services normally sold

#### **CASE STUDY – SPONSORSHIP, IN-KIND SUPPORT AND SECONDMENT**

An after school club was keen to provide free or subsidised places to children from low income families. A parents' survey revealed that a large percentage worked at the same company. This company was approached for support on the basis that the charity was providing a vital community service (giving parents childcare, enabling them to work). The company agreed to sponsor the club for a year. After the relationship was established, the company regularly supplied raffle prizes, used office equipment and also seconded an accountant ½ day per month to help with the charity's finances. This relationship has continued and been built upon, with employees volunteering and the parents having a more positive feeling towards the company. The children of the club regularly send artwork to the company (which is displayed). Company employees are invited the club's Fete every year.

## **h. OTHER SOURCES**

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### **Churches and other religious organisations**

Some religious institutions will have charitable arms set up to give to projects that serve their membership (e.g. the Church of Scotland's Board of Social Responsibility). Others will help through events or even give directly through the congregation.

Many religions have charitable giving as a main tenet of their faith (Judaism and the Muslim Religion in particular) and will be committed to the idea of supporting charitable work. The best approach here is through personal contacts in the congregation. You also need to consider the needs of the congregation and how your work relates to those needs.

### **Schools**

Many schools will choose a charity to raise funds for. You could be that charity! There are some ethical issues about propagandising children that you need to be aware might cause some problems. Make sure you have the support of the Head teacher and staff before you start. Getting children involved in projects and as volunteers is a good base.

Try and make connections between the National Curriculum and your issues. Providing information packs about the issues your organisation works with and involving the teachers is also a way into schools.

#### **CASE STUDY – INVOLVING SCHOOLS**

A primary school and a local Wildlife Trust worked together to create a wildlife garden in the playground. The project was integrated into the curriculum through science (plants and animals), maths (surveying and plotting out the garden) and art (drawing plants and flowers). Parents volunteered both time / labour and equipment, the children organised sponsored events to buy some of the plants and the charity contributed staff time and expertise. There was considerable local press coverage and a local councillor 'opened' the garden. The charity was able to raise its profile in the community and gain new members.

#### **Other charities**

Many fundraising charities are also grant givers, although they may not publicise this. Examples of grant givers in the past have included Save the Children, and Help the Aged. You should network with other charities doing similar and complimentary work to your own. Find out who may fund what you are doing. A possible option here is to explore joint funding projects (see Partnerships section). Another charity may be willing to fund your work because it meets the same objectives it has. You may have the contacts or expertise and be able to deliver a project more effectively.

#### **Award schemes and competitions**

These schemes are usually devised to give one-off grants for specific projects or activities. There are also a series of award schemes to honour individuals as volunteers and fundraisers. The awards are usually publicised through the press, local Councils for Voluntary Service and voluntary sector umbrella organisations like SCVO and Volunteer Development Scotland (VDS). These are often quite competitive and have quite a restrictive brief, but are worth investigating.

#### **CASE STUDY – AWARD SCHEMES**

A community centre in an urban area wanted to improve the facilities and upgrade the rooms for use by outside organisations. Through an application to the Dulux Community Projects Scheme, they were able to repaint the centre and create a more welcoming atmosphere, as well as improve the deteriorating condition of the building.

#### **Clubs and associations**

There are dozens of clubs in every community ranging from the Lions and Rotary to special interest groups. These social and business groups very often encourage their members to raise money for local charities and might be happy to help with your events.

Look to your management committee, friends, supporters and volunteers to make contacts with these groups. You can ask to make a presentation at one of their meetings about your organisation to generate interest or you can try inviting group leaders to your events and meetings as a first step. You may not get an immediate response or interest

in support; however you have raised your profile and made a new group of people aware of your cause and services.

### **CASE STUDY – CLUBS AND ASSOCIATIONS**

A women's social club holds regular lunchtime meetings with a speaker as part of their programme. One of the members of this club was approached by a friend who worked for an organisation that worked with children with disabilities to be the speaker for a meeting. This person did a presentation about their charity's work and invited the club members to visit a project. The speaker also encouraged the club members to volunteer for the charity. After the presentation, the club decided to hold a series of fundraising events to benefit the charity. This relationship has continued for several years.

### **Unions**

This is a potential source to investigate if your target audience is connected with a union, you directly serve their membership or address a concern they are working on. They may encourage their members to participate in sponsored events or be able to provide in-kind support (skills and knowledge) or donation of goods. Again, raising your concerns to their membership may generate support in the long term.

### **Loans**

Loans allow voluntary organisations to do today, what might otherwise take years, whilst they find the money to do it. The Triodos Bank and a few other commercial lenders are open to approaches from the voluntary sector and social enterprise firms. In addition a few Trusts also operate a loan programme notably the The Esmee Fairbairn Trust.

Loans are more flexible than some other types of funding, they are less time-consuming to arrange and the reporting / monitoring requirements are not as onerous. Whoever the lender, they expect to be repaid, so you need to show how you will repay the loan. Usually, this forms part of a business plan where you describe your income over the period of the loan.

As a legal agreement is being entered into, it means full discussion with, and agreement of, your management committee or board of directors. You will also need to check your constitution or similar governing document to see if it allows the organisation to borrow money.

### **New Media**

New Media is not a source of funding as such, but rather a way of using a combination of the usual methods of fundraising in a new way. For example- Amazon.com has an 'affinity scheme' (like sponsorship and donations combined) – By placing their click through logo onto your website – you receive a percentage of any sale of a book/CD etc bought as a result of someone coming to your site first and then going onto Amazon. There is usually no cost to you or the person who buys an Amazon product. There are a number of similar schemes and shopping sites that give a percentage or set amount to

charities including a search engine (everyclick.com) that triggers a donation to a specified group of charities every time it's used.

These type of schemes may work well for you if you have a well used and developed website and your constituency uses the web frequently. Do however; check the small print in any agreement, as some schemes are more straightforward than others.

Texting and instant messaging have been used in a variety of ways to generate funds and support. Audiences at music festivals or other events can be asked to text donations, send messages of support/protest, become members and undertake other actions on behalf of an organisation. The success of this kind of activity again depends on knowing your audience, their familiarity with the mysteries of text and instant messaging and most importantly the match between their interests and your cause.

Other examples of the use of new media have recently included downloading music or other entertainment for a fee that goes to a charity, receiving bespoke ring tones for a fee to a mobile, and giving access to pod casts or video on the web for a fee.

## CHAPTER 5

### Bringing it All Together





## Chapter 5

# Bringing it All Together



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There are a number of tasks, in addition to the ones already covered in previous chapters that you need to tackle to bring all your work together. These are finalising and refining your research, forming partnerships with other organisations and, if appropriate, getting matching funds and taking care of your funders or donor care.

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### 5.1 RESEARCH AND NETWORKING (LOOKING BEYOND THE DIRECTORIES)

Applying to the right funder at the right time is one of the factors that will determine your fundraising effectiveness.

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The various directories of information on grant making trusts and companies (see appendix) will give you the general criteria of most of the major funders and some idea of timescale for applications. Further sources of information on smaller or less well-known sources include lawyers and other organisations' annual reports. In addition you should also make use of:

- The business pages of national newspapers e.g. The Scotsman and The Herald for general information on government initiatives and company news.
- Your local and regional newspapers (particularly for news on local companies).
- The local Chamber of Commerce and Business Associations.
- Voluntary sector research publications produced by e.g. the Directory of Social Change and the Charities Aid Foundation for the big picture and the major funders.
- Local and regional conferences and seminars aimed at the voluntary sector (funders are often asked to speak or participate in information sessions). Two established yearly events in Scotland are the Institute of Fundraising Conference (November) and SCVO's Gathering (June). The DSC's Charityfair is the biggest learning and networking event for the UK voluntary sector, held every April. They are presently moving it out of London to hold it on a rotating basis in other cities in England.
- Local and national umbrella organisations for voluntary organisations (they often produce a directory of locally-based funders) e.g. SCVO, Glasgow Council for the Voluntary Sector (GCVS), local CVSs and volunteer centres.
- Local authorities (which often administer local trusts and bequests).

- Professional bodies such as the Institute Fundraising (IOF), Management Development Network Scotland for training, networking and peer support.
- Other fundraisers - they can share their experiences and information.

In addition there is a wealth of useful material and websites to look at on the internet. A growing number of grant making trusts and companies have websites, which outline their policies and give guidance to applicants. The Big Lottery, Children in Need and Comic Relief for instance, have extensive information, including application forms you can download.

Company research can be quite productive on the internet. Look for links on a company's website to areas like 'community involvement' or 'employee activities'. Some websites will detail the areas the company is supporting and give examples of projects they have been involved with.

The appendix gives some websites to start with, chosen because they have links to a host of other websites which cover everything from tips to running events to chat rooms for fundraisers. Also included in the list are a few North American websites which have some interesting ideas and links which might inspire you.

You can never do too much research. The point is to only approach those funders who fund the type of work that you do. That way, you will be more effective in your approaches and not waste your own time or the funder's time.

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## **5.2 MATCH AND PARTNERSHIP FUNDING**

Match and partnership funding are key concepts in both the voluntary sector and in the grant givers' world. In the present fundraising and giving climate, there are a growing number of funders who now require partners and match funding.

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Some of the reasons for this requirement may include:

- Limited money - the funder may want to spread its grants across a number of organisations by giving smaller amounts, therefore supporting a wider range of projects.
- Funders want to ensure the project is viable and has credibility. If others will put money in, it must be good!
- The funder is limited by its constitution, charter or guidelines and can only be a partial funder by law.
- Large, complex or multi-disciplinary projects may have aspects of the work which fall outside a funder's guidelines or cover some areas it does not wish to fund.



- The amount being asked for is too much from one source.

Some examples of funders that require match funding are - The Heritage Lottery Fund (up to 75% is provided, 25% needs to be matched), the European Social Fund (45% - 65% is provided, the rest has to come from other funders) and Historic Scotland (50%). Most Scottish Executive grants require match funding as well.

Don't forget that staff and / or volunteer time (as well as donated goods or services) can usually be counted as part of the match funding. You need to check on the actual percentages allowed on a funder by funder basis, but this can contribute significantly to the overall funding of a piece of work / project with out having to come up with cash.

Although most funders don't require a specific percentage of matching, they will rarely fund an entire project - they will want to know where other funding is going to come from and need assurances that there are other supporters – so, in practical terms, you will probably need to find partner sources of funding to do most of your work.

When you know a funder is going to require matching money or a partner, you need to start lining up the possible sources at the same time as applying to that funder (before if possible). Don't underestimate the amount of time this may take! When you apply for European money, the application will usually ask where the remainder is coming from and expect it to be already be in hand or promised. This means doing two jobs at once.

It can be a bit of a chicken and egg process e.g. local authorities will not commit to funding your work until you have a yes from the other funder, you can't get a yes from the main funder until you have the matching funding in place. This requires a fair amount of juggling. Try to get an initial letter of interest or intention from your potential funder. Use this to leverage other support. Keep updating your approaches by letting each funder know when you have been successful from another supporter - it may encourage them to come on board.

Unlike match funding, when you put together partnership funding you are not just looking for someone to put up money. You are looking for another organisation to compliment and work with you. This process will ask the partner for a commitment to the aims and objectives of your organisation and the project you are trying to put together. You also have to take account of your partner organisation's differing philosophies, ways of working and different aims. You need to be able to find common ground. You will also need to be aware of differing levels of resources that each group can bring to the partnership and the different constituencies that each group serves.

Most people would agree that it makes social and economic sense to share resources, skills, expertise and knowledge as well as contacts and enthusiasm to work towards a common goal. However, there are many practicalities that can be a barrier to this working well, not least the feeling that many groups have of being 'forced' into collaboration partnerships against their will by funders in order to get money.

### **CASE STUDY - PARTNERSHIP**

A successful partnership was forged between a heritage umbrella charity, a local voluntary history society and a Wildlife Trust. The project was conceived by the Wildlife Trust to create and care for a nature walking trail. There also happened to be an archaeological site of local interest on the path. Local organisations began to see there might be possibilities of collaboration and the aims were changed to providing both local people and visitors with a recreational facility as well as highlighting and preserving unique features of natural and historic interest. As the project progressed, more partners were brought in - Historic Scotland (because of the archaeological site), a private forestry company (whose property needed to be crossed for access to the parking lot for visitors), a private land owner who was interested in area history, the local authority and the local tourist board who began to see opportunities for promoting tourism in an underdeveloped area. A partnership was formed with two organisations taking the lead and funding was found relatively easily as each group was able to bring on board their own supporters as well as appealing to a wider constituency.

These groups did not have a previous connection with each other. The project provided a common ground - that of preservation of the landscape, both natural and historic, as well as potential opportunities for leisure, recreation and tourism. It was then able to attract funders that none of the individual groups could have done on their own and this in turn encouraged other funders to take an interest.

The roles and responsibilities of each partner were worked out right from the beginning, taking account of the expertise and resources of each group involved. This process was very time-consuming, but it was essential to the overall success of the collaboration.

How can partnership work for you? First you need to look at the work that you are doing and are planning to do. Which parts of your work lend themselves best to working and collaborating with other organisations. The key is not only thinking about what you need, but also what you can offer to other groups.

The following partnership checklist is taken from 'New Directions', published in 1995 by The Scottish Community Development Centre (see appendix).

- What is your vision as an organisation? What is your motivation to work in partnership?
- What costs and benefits are involved in a collaboration?
- Who in your organisation would be involved in the partnership? Who would be most affected? How will you involve them?
- Is there a mechanism for including those most often excluded from the decision-making process?

- What expectations do you have about your partners? What ground rules do you wish to have as a group?
- What is the mission statement of your partnership?
- What are the goals and objectives of the partnership?
- Who will get the work done? How can you link individuals and organisations to specific objectives to get the job done in a timely way?
- Are there other models of similar partnerships to look at and learn from?
- What can each partner contribute to the partnership?
- How does the partnership group identify and encourage new members to participate?
- How is the partnership governed? Who makes decisions and what authority do they have to make them? How will governing responsibilities be rotated over time? How will the way decisions are taken reflect and respect the diversity of participants?
- Who is providing the leadership of the partnership? How effective is the leadership?
- How is the partnership managed and administered? Is there a need for delegated staff support? How is this accounted for in terms of time and / or expense to each of the organisations?
- Will the partnership need training in areas like group processes, conflict resolution and managing cultural diversity and inclusiveness?
- How will the partnership monitor progress and evaluate success?

When approaching a funder with a project made up of partners, it is often useful to designate one spokesperson to negotiate. This avoids confusion and the possibility of conflicting ideas. This person needs to be well briefed and have the authority to speak on behalf of each of the groups or organisations involved.

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### **5.3 AFTER THE CHEQUE IS IN THE BANK**

The importance of evaluation and monitoring in the context of writing applications, individual giving campaigns and event fundraising cannot be emphasised enough. It is important for both for the internal health of your organisation and for building long-term relationships with your funders.

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If you are not able to show the funder what their support achieved, that you did a good job with their money and that your work was effective, it is unlikely they will want to

support you again. You want to build on your relationships, not just receive one-off support.

There is a fine line between keeping the funder informed about what you are doing and deluging them with information. As soon as you get the grant, find out how the funder wants to be kept informed. Do they want a written evaluation? How often? Would a visit to your organisation, a presentation or a visit to the project be more appropriate? If there are monitoring / evaluation forms to be filled in (European funding, local authorities and the Scottish Executive will have a pile!), be sure you understand them and fill them out on time.

You also have to find out how the funder wishes to be acknowledged and recognised. Do you have to put their name in lights or just write a line in your annual report? Some will want their logo on publications or require specific wording. A generic acknowledgment might be worded '*The XXX charity gratefully acknowledges the Good Works Trust for their support on this project*' or '*XXX would like to thank the Good Works Trust without whose support this project would not be possible*'. Some funders will wish to remain anonymous. Find this out at the beginning so there are no misunderstandings.

## **CHAPTER 6**

### **Conclusions**





## Chapter 6

# Conclusions



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There will always be new techniques and flavour of the month trends coming along, however the following basic principles can be applied to new ideas as well as tried and true techniques. They will help you form a foundation from which you can build an effective fundraising base.

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- **DIVERSIFY YOUR INCOME SOURCES**

Get support from as many different funders as possible and reduce your dependence on single funders. Central government, European funding, local authorities and the Lottery change their priorities and emphasis every few years. If you receive large proportions of your income from these areas, chances are that after 3 years you will need to look elsewhere. The more income from individuals, earned income and other sources you have, the more stable you will be in the long term and less single grant dependant.

- **DO YOUR HOMEWORK**

A successful request for funding depends on asking the right source for the right amount at the appropriate time. Check the funder's guidelines and make sure you fall within them. Make sure they have a record of giving to your cause and in your geographical area. Know their deadlines and requirements for applications. Plan out a calendar of applications that fit in with when you need the money, allowing 6 – 9 months for a response.

- **MAKE YOUR APPLICATION STAND OUT**

A short, clear and well-structured case for support is key. SMART objectives, a good need statement, sensible outcomes, clear budget and effective evaluation and monitoring measures will put your application to the top of the pile.

- **BUILD ON PAST RELATIONSHIPS, CREATE NEW ONES**

Go back to your core supporters (those who thought you were terrific and helped you in the past). They have already committed themselves to your cause and are likely to continue if you nurture the relationship. Seek new relationships and cultivate potential supporters by raising the profile of your work and telling people about your successes.

- **THANK YOUR SUPPORTERS**

Keep your supporters informed about your work. Make sure their support is acknowledged in the way they would like it to be recognised. Ask them to bring their contacts and friends on board as well.

- **EVALUATE YOUR EFFORTS AND WORK TOWARDS A LONGER TERM STRATEGY**

Which approaches worked? Which were not so successful and why? Plan ahead for the next year, taking into account how much time you have to spend on fundraising and how much you need.

- **BE POSITIVE**

Your work is important. You will get support if you persist and present yourself in a business-like and organised way. Don't be afraid to sing your own praises, but back it up with facts and figures.



## APPENDIX

### Useful Organisations and Advice Bodies

#### Publications

#### Journals

#### Websites





## Appendix



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### USEFUL ORGANISATIONS AND ADVICE BODIES

The following are a selection of organisations and advice bodies that you will find useful.

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#### ARTS AND BUSINESS

[www.AandB.org.uk](http://www.AandB.org.uk)

Develops and supports business partnerships with the arts throughout the UK.

13 Abercromby Place, Edinburgh EH3 6LB

tel: 0131 558 1277 / e-mail: [scotland@AandB.org.uk](mailto:scotland@AandB.org.uk)).

#### ASSOCIATION OF CHARITABLE FOUNDATIONS (ACF)

[www.acf.org.uk](http://www.acf.org.uk)

The UK's national support organisation for grant making trusts and foundations of all types. ACF publishes guidance for grant seekers (see website), but does not make grants itself.

Central House, 14 Upper Woburn Place, London WC1H 0AE

tel: 020 7255 4499 e-mail: [acf@acf.org.uk](mailto:acf@acf.org.uk)

ACF's website has links to the websites of its member trusts and foundations.

#### ASSOCIATION OF FUNDRAISING CONSULTANTS (AFC)

[www.afc.org.uk](http://www.afc.org.uk)

Suite 316, Linen Hall

162-168 Regent Street

London

W1B 4JN

tel: 01582 762446 Fax: 01582 461489 email: [enquiries@afc.org.uk](mailto:enquiries@afc.org.uk)

The professional association for fundraising consultants, agreeing, promoting and protecting standards of service.

#### AWARDS FOR ALL

[www.awardsforall.org.uk](http://www.awardsforall.org.uk)

Awards for All

4th Floor 1 Atlantic Quay

1 Robertson Street

Glasgow G2 8JB

Tel: 0141 242 1400 Fax: 0141 242 1401

Textphone: 0141 242 1500 Email: [scotland@awardsforall.org.uk](mailto:scotland@awardsforall.org.uk)

Application packs can be downloaded from the website

#### BBC CHILDREN IN NEED APPEAL

[www.bbc.co.uk/scotland/pudsey/index.shtml](http://www.bbc.co.uk/scotland/pudsey/index.shtml)

BBC Scotland

Holyrood Road

Edinburgh EH8 8JF

Tel: 0131 248 4225. email [cingrants@bbc.co.uk](mailto:cingrants@bbc.co.uk)

### **BIG LOTTERY FUND**

[www.thebiglotteryfund.org.uk](http://www.thebiglotteryfund.org.uk)

1 Atlantic Quay

1 Robertson Way

Glasgow G2 8JB

Enquiries and information line: 0870 240 2391

Telephone: 0141 242 1400 Fax: 0141 242 1401

Textphone: 0141 242 1500

Application packs and information on programmes: 0845 4 10 20 30

Email: [enquiries.scotland@biglotteryfund.org.uk](mailto:enquiries.scotland@biglotteryfund.org.uk)

### **CHARITIES ADVISORY TRUST**

Advises on all aspects of charity trading.

Radius Works, Back Lane, London NW3 1HL

Tel: 020 7794 9835 Fax: 020 7431 3739

email: [people@charitiesadvisorytrust.org.uk](mailto:people@charitiesadvisorytrust.org.uk)

### **CHARITIES AID FOUNDATION (CAF)**

[www.cafonline.org](http://www.cafonline.org)

CAF helps non profit organisations in the UK and overseas to increase, manage and administer their resources e.g. by making grants for consultancy and training, advising on tax-effective giving, researching and producing publications. Other CAF sites include [www.ccinet.org](http://www.ccinet.org) (company giving), [www.allaboutgiving.org](http://www.allaboutgiving.org) (tax-effective giving) and [www.giveasyouearn.org](http://www.giveasyouearn.org) (payroll giving).

CAF, Kings Hill, West Malling, Kent ME19 4TA

tel: 01732 520 000 email: [info@caf.charitynet.org](mailto:info@caf.charitynet.org)).

### **CHARITY COMMISSION**

[www.charity-commission.gov.uk](http://www.charity-commission.gov.uk)

Harmsworth House,

13-15 Bouverie Street, London. EC4Y 8DP

tel: 0845 3000 218 email: [enquiries@charitycommission.gsi.gov.uk](mailto:enquiries@charitycommission.gsi.gov.uk)

The Charity Commission is the government department set up to help charities in England and Wales use their resources more effectively and ensure that the public's trust in charities continues to be justified.

Website includes a searchable database of all 182,000 registered charities in England and Wales and guidance on a wide range of issues (e.g. accounting, responsibilities of Trustees, campaigning, involving users on management committees, fundraising, reserves).

**COMIC RELIEF UK**

[www.comicrelief.com](http://www.comicrelief.com)

5th Floor

89 Albert Embankment

London SE1 7TP

tel: 020 7820 5555 fax: 020 7820 5500 general enquiries: [red@comicrelief.org.uk](mailto:red@comicrelief.org.uk)

**COMMUNITY ENTERPRISE IN STRATHCLYDE (CEIS)**

[www.ceis.org.uk](http://www.ceis.org.uk)

CEiS is a Glasgow-based agency for the development of the social economy.

Legal House, 101 Gorbals Street,

Glasgow G5 9DW

tel: 0141 429 8089 email : [ceis@ceis.org.uk](mailto:ceis@ceis.org.uk)

**COMMUNITY ENTERPRISE LIMITED (CEL)**

[www.communityenterprise.co.uk](http://www.communityenterprise.co.uk).

CEL operates an investment fund to help develop and fund new community enterprises and social firms in Edinburgh, helping communities to release their own enterprise potential. Grants up to £1,500 and loans up to £5,000 are available.

Inspire Business Centre

Oatridge College,

Ecclesmachan,

West Lothian EH54 6NH

Central Phone :01506 862 227 Fax : 01506 862 491

email: [info@communityenterprise.co.uk](mailto:info@communityenterprise.co.uk)

**COMMUNITY FOUNDATION NETWORK (CFN)**

[www.communityfoundations.org.uk](http://www.communityfoundations.org.uk)

(formerly known as the Association of Community Trusts & Foundations)

CFN supports the UK's community foundations, which manage and build endowments for the long term benefit of voluntary and community groups within specific geographical areas.

Arena House, 66-68 Pentonville Road

London [N1 9HS](#)

Telephone +44 20 7713 9326 Fax +44 20 7713 9327

Email [network@communityfoundations.org.uk](mailto:network@communityfoundations.org.uk)

CFN's website has links to the websites of its member community foundations (e.g. Scottish Community Foundation).

**COMMUNITIES SCOTLAND**

[www.communitiesscotland.gov.uk](http://www.communitiesscotland.gov.uk)

[Communities Scotland](#) is a Scottish Executive agency formally known as Scottish Homes. Their aim is to work with others to ensure decent housing and strong communities across Scotland. They have seven area offices located in:

- [Glasgow](#) Highlander House, 58 Waterloo Street, Glasgow G2 7DA (tel: 0141 226 4611).

- [Grampian](#) Johnstone House, Floor 2 Suite A, 50-54 Rose Street, Aberdeen, AB10 1UD Tel: 01224 624960 Fax: 01224 62516
- [Highlands and Islands](#) at Urquhart House, Beechwood Park, Inverness IV2 3BW (tel: 01463 711 272).
- [Lothian, Borders and Fife](#) Rosebery House, 9 Haymarket Terrace, Edinburgh EH12 5YA (tel: 0131 313 3700).
- [North and South Clyde](#) St James House ,25 St James Street, Paisley, PA3 2HQ, Tel: 0141 889 8896
- [South West Scotland](#) Rex House, Bothwell Road, ,Hamilton. ML3 0DW Tel: 01698 420042 Ayr Office: 52/66 Newmarket Street, AYR. KA7 1LR Tel: 01292 611810
- [Tayside and Forth Valley](#) Endeavour House 1 Greenmarket Dundee DD1 4QB Tel: 01382 427500

### **COUNCILS FOR VOLUNTARY SERVICE (CVS)**

The Councils for Voluntary Service (CVS) network consists of 56 independent organisations that provide a range of development and support services to voluntary organisations across Scotland. CVS activity is supported by the Scottish Executive and local authorities, as well as by trading income and funding from a wide range of sources. The CVS Network works with voluntary organisations to help them to become more effective and efficient. [www.scvo.org.uk/cvsnetwork](http://www.scvo.org.uk/cvsnetwork)

This website provides the public with access to:

- Information on the Network & the Core Activities Framework
- A CVS Directory (with up to date contact details for all CVS)
- Network News
- Information on forthcoming training & events
- Case Studies relevant to the Core Activities Framework

In addition it provides a range of on-line services for CVS Network members to help them to communicate and collaborate more effectively.

### **DEVELOPING STRATHCLYDE LIMITED (DSL)**

DSL, Unit 37, Ladywell Business Centre, Glasgow, G4 0UW

Tel: 0141 572 5551 • Fax: 0141 572 5553 • [info@dsl-businessfinance.co.uk](mailto:info@dsl-businessfinance.co.uk)

DSL's vision and mission is to help create employment for local residents, thereby reducing poverty levels, by providing access to capital to organisations which are, or will be, based within the Regeneration Areas of Glasgow. DSL manages the Glasgow Regeneration Fund (GRF) and the Social Enterprise Fund (SEF), which loans up to £20,000 to social economy organisations. DSL is a division of CEIS (see above)

### **DIRECTORY OF SOCIAL CHANGE (DSC)**

[www.dsc.org.uk](http://www.dsc.org.uk)

DSC provides practical, challenging and affordable information and training to meet the current, emerging and future needs of the UK's voluntary and community sector.

24 Stephenson Way,  
London NW1 2DP

Tel: 020 7391 4800 Fax: 020 7391 4808 email: [info@dsc.org.uk](mailto:info@dsc.org.uk)).

The website's bookshop lists all current fundraising, management, legal and financial publications

### **DULUX**

UK charities can apply to the Dulux Community Projects scheme to receive free paint. Winners receive their paint sometime in July / August. For more information and an entry form, send a 60p SAE to Dulux Community Projects Office, PO Box 343, London WC2E 8RJ.

In addition to the Dulux scheme, there is also a network of local Community Re>Paint Schemes in the UK – contact Save Waste and Prosper Ltd, 74 Kirkgate, Leeds LS2 7DJ (tel: 0113 243 8777 / fax: 0113 234 4222) for details.

### **EASTERN SCOTLAND EUROPEAN PARTNERSHIP**

[www.esep.co.uk](http://www.esep.co.uk)

The Eastern Scotland European Partnership is essentially a network of local organisations working together to achieve the best use of European grants.

Enterprise Way,  
Carnegie Campus South,  
Dunfermline, Fife KY11 8PY tel: 01383 622 537.

### **EURO CITIZEN ACTION SERVICE (ECAS)**

[www.ecas.org](http://www.ecas.org)

ECAS is an independent non-profit organisation that promotes more informed, influential and protected citizenship within the European Union. ECAS produces guidance on accessing EU funding.

ECAS - European Citizen Action Service

83 Rue du Prince Royal - B-1050 Brussels email: [info@ecas.org](mailto:info@ecas.org)

### **FORWARD SCOTLAND**

[www.forward-scotland.org.uk](http://www.forward-scotland.org.uk)

Promotes sustainable development in Scotland through practical projects and policy development. Provides information to community groups and voluntary organisations on the Landfill Tax Credit Scheme. Small project grants of up to £500 are available.

6<sup>th</sup> Floor, Portcullis House

21 India Street, Glasgow G2 4PZ tel: 0141 222 5600 / e-mail: [enquiries@forward-scotland.org.uk](mailto:enquiries@forward-scotland.org.uk)).

### **FUNDERFINDER**

[www.funderfinder.org.uk](http://www.funderfinder.org.uk)

- FunderFinder Groups in Need (GIN) is a searchable database which helps voluntary groups throughout the UK identify appropriate grant making trusts to research further (using published directories and information available directly from the trusts).
- FunderFinder People in Need (PIN) is a separate searchable database to help identify appropriate grant making trusts which support individuals throughout the UK.

Many organisations (e.g. CVSSs, libraries) have either FunderFinder GIN and / or PIN databases which are free to use by voluntary groups and individuals in their area. To find out where you can access the databases, contact FunderFinder.

- FunderFinder also produces Apply Yourself, a Windows only software program that helps groups write a grant application. The computer package can be downloaded free of charge from the website.

65 Raglan Road, Leeds LS2 9DZ (tel: 0113 243 3008 / e-mail: [info@funderfinder.org.uk](mailto:info@funderfinder.org.uk)).

## **HERITAGE LOTTERY FUND (HLF)**

[www.hlf.org.uk](http://www.hlf.org.uk)

Scotland Office - 28 Thistle Street, Edinburgh EH2 1EN  
tel: 0131 225 9450 / fax: 0131 225 9454 email: [scotland@hlf.org.uk](mailto:scotland@hlf.org.uk)  
Application packs can also be downloaded from the website.

## **HIGHLANDS AND ISLANDS ENTERPRISE (HIE)**

[www.hie.co.uk](http://www.hie.co.uk)

HIE aims to unlock the potential of the people of the area to help create a diverse and sustainable economy where quality of life is matched by quality of opportunity. Examples of this would be help for community projects such as swimming pools and village halls and support for tours by theatre companies.

Cowan House

Inverness Retail and Business Park

Inverness IV2 7GF

Telephone: 01463 234171 Fax: 01463 244469 email: [hie.general@hient.co.uk](mailto:hie.general@hient.co.uk)

HIE has set up another office to deal specifically with the Scottish Land Fund to assist rural communities throughout Scotland with sustainable development projects involving land acquisition, development and management - contact the

Scottish Land Fund, c/o Taigh Fearna, Auchtertyre, Balmacara, Kyle IV40 8EG (tel: 01520 722 988 / e-mail: [hie.general@hient.co.uk](mailto:hie.general@hient.co.uk)).

## **HISTORIC SCOTLAND**

[www.historic-scotland.gov.uk](http://www.historic-scotland.gov.uk)



Historic Scotland safeguards the nation's built heritage and promotes its understanding and enjoyment.

Longmore House, Salisbury Place,  
Edinburgh EH9 1SH tel: 0131 668 8600

### **IN KIND DIRECT**

[www.inkinddirect.org.uk](http://www.inkinddirect.org.uk)

(formerly Gifts in Kind UK). Acts as a clearinghouse for surplus goods from the corporate sector, mainly manufacturers and retailers, channelling them to good causes in the voluntary sector.

19 Milk Street

London EC2V 8AN

Tel: 020 7860 5930 Fax: 020 7860 5920 E-mail: [info@inkinddirect.org](mailto:info@inkinddirect.org)

### **INLAND REVENUE**

[www.inlandrevenue.gov.uk](http://www.inlandrevenue.gov.uk)

Information on VAT, Gift AID, Payroll Giving and a variety of other tax issues

### **INSTITUTE OF FUNDRAISING**

[www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)

IOF's mission is to promote the highest standards of fundraising practice.

The Institute of Fundraising Scotland provides courses, seminars and informal meetings for members and prospective members living and working in Scotland. Members represent a wide range of charities from 'good causes' to environment, education to arts and many more. IOF are aware of the difficulties faced by 'lone' fundraisers and those working in geographic isolation and try to ensure that what the Institute of Fundraising - Scotland provides is relevant and available to as many fundraisers as possible.

A full range of training and events are held in Scotland. There are six Special Interest Groups who organise a programme of meetings. Details of the Special Interest Groups can be found on the Events page of the website (Scotland is listed as a region) and they each have their own page on the website which sets out their programme of events

Contact: [scotland@institute-of-fundraising.org.uk](mailto:scotland@institute-of-fundraising.org.uk)

### **LLOYDS TSB FOUNDATION FOR SCOTLAND**

[www.ltsbfoundationforscotland.org.uk](http://www.ltsbfoundationforscotland.org.uk)

A large grant making trust supporting recognised charities in Scotland. The Foundation also makes grants for capacity building projects e.g. consultancy, training.

Riverside House

502 Gorgie Road

Edinburgh EH11 3AF

tel 0870 902 1201 fax 0870 902 1202 e-mail [enquiries@fundingthefuture.org.uk](mailto:enquiries@fundingthefuture.org.uk)

### **NATIONAL COUNCIL FOR VOLUNTARY ORGANISATIONS (NCVO)**

[www.ncvo-vol.org.uk](http://www.ncvo-vol.org.uk)

The national umbrella body for the voluntary sector in England.

Regent's Wharf,

8 All Saints Street,

London N1 9RL

Helpdesk 0800 2 798 798 email [helpdesk@askncvo.org.uk](mailto:helpdesk@askncvo.org.uk)

Main Switchboard 020 7713 6161 Fax 020 7713 6300 email [ncvo@ncvo-vol.org.uk](mailto:ncvo@ncvo-vol.org.uk)

### **NORTHERN IRELAND COUNCIL FOR VOLUNTARY ACTION (NICVA)**

[www.nicva.org](http://www.nicva.org)

The national umbrella body for the voluntary sector in Northern Ireland.

61 Duncairn Gardens, Belfast BT15 2GB, N Ireland

tel: 028 9087 7777 / e-mail: [nicva@nicva.org](mailto:nicva@nicva.org)).

### **RETIRED EXECUTIVES ACTION CLEARING HOUSE (REACH)**

[www.volwork.org.uk](http://www.volwork.org.uk)

Acts as a link to bring retired executives from business and industry to work on an expenses-only basis for voluntary organisations.

Dalry House, 15 Orwell Place,

Edinburgh EH11 2AD tel: 0131 366 1080).

### **SCOTTISH ARTS COUNCIL (SAC)**

[www.sac.org.uk](http://www.sac.org.uk)

SAC is one of the main channels of public and National Lottery funding for the arts in Scotland.

12 Manor Place

Edinburgh EH3 7DD tel: 0131 226 6051 / fax: 0131 225 9833

### **SCOTTISH BUSINESS IN THE COMMUNITY (SBC)**

[www.sbcscot.com](http://www.sbcscot.com)

SBC represents Scottish business in the important areas of corporate social responsibility and community investment. SBC's Professional Firms Network is a national network of companies who provide their services free to voluntary and community groups in Scotland. SBC's Senior Executive Programme utilises the skills of volunteer retired and semi-retired managers and professionals to provide free technical and professional advice to charitable and community organisations in Scotland.

Livingstone House, First Floor (East)

43a Discovery Terrace

Heriot-Watt University Research Park

Edinburgh, EH14 4AP tel 0131 451 1100 email: [info@sbcsot.com](mailto:info@sbcsot.com)).

### **SCOTTISH COMMUNITY DEVELOPMENT CENTRE (SCDC)**

[www.scdc.org.uk](http://www.scdc.org.uk)

Promotes and supports best practice in community development throughout Scotland.

Suite 329, Baltic Chambers,

30 Wellington Street

Glasgow G2 6HJ tel: 0141 248 1924 / fax: 0141 248 4938 / e-mail: [scdc@cdf.org.uk](mailto:scdc@cdf.org.uk)).

### **SCOTTISH COUNCIL FOR VOLUNTARY ORGANISATIONS (SCVO)**

[www.scvo.org.uk](http://www.scvo.org.uk)

Mansfield Traquair Centre

15 Mansfield Place  
Edinburgh EH3 6BB Tel:0131 556 3882 Fax:0131 556 0279  
Email:[enquiries@scvo.org.uk](mailto:enquiries@scvo.org.uk)

The national umbrella body for the voluntary sector in Scotland. SCVO provides a range of information, advice, research, publications and training to help the voluntary sector raise funds.

### **SCOTTISH ENTERPRISE**

[www.scottish-enterprise.com](http://www.scottish-enterprise.com)

Scottish Enterprise is involved in any area of activity, which is concerned with economic development in Scotland. The Scottish Enterprise Network comprises of Scottish Enterprise National (SEN) and 13 Local Enterprise Companies (LECs) from Grampian to the Borders. LECs work closely at a local level with organisations in their area, either through projects and programmes devised and implemented by themselves, or local delivery of national programmes instigated by Scottish Enterprise National.

Scottish Enterprise Headquarters  
5 Atlantic Quay  
150 Broomielaw  
Glasgow G2 8LU Tel: 0141 248 2700 Fax: 0141 221 3217

#### [Scottish Enterprise Ayrshire](#)

17-19 Hill Street  
KILMARNOCK  
KA3 1HA Tel: 01563 526623 Fax: 01563 543636

#### [Scottish Enterprise Borders](#)

Bridge Street  
GALASHIELS  
TD1 1SW Tel: 01896 758991 Fax: 01896 758625

#### [Scottish Enterprise Dumfries & Galloway](#)

Solway House  
Dumfries Enterprise Park  
Tinwald Downs Road  
DUMFRIES DG1 3SJ Tel 01387 245000 Fax: 01387 246224

#### [Scottish Enterprise Dunbartonshire](#)

2nd Floor, Spectrum House  
Clydebank Business Park  
Clydebank GLASGOW G81 2DR Tel: 0141 951 2121 Fax: 0141 951 1907

#### [Scottish Enterprise Edinburgh and Lothian](#)

Apex House  
99 Haymarket Terrace  
EDINBURGH EH12 5HD Tel: 0131 313 4000 Fax: 0131 313 4231

[Scottish Enterprise Fife](#)

Kingdom House  
Saltire Centre  
Glenrothes FIFE KY6 2AQ Tel: 01592 623000 Fax: 01592 623149

[Scottish Enterprise Forth Valley](#)

Laurel House  
Laurelhill Business Park  
STIRLING FK7 9JQ Tel: 01786 451919 Fax: 01786 478123

[Scottish Enterprise Glasgow](#)

Atrium Court  
50 Waterloo Street  
GLASGOW G2 6HQ Tel: 0141 204 1111 Fax: 0141 248 1600

[Scottish Enterprise Grampian](#)

27 Albyn Place  
ABERDEEN AB10 1DB Tel: 01224 252000 Fax: 01224 213417

[Scottish Enterprise Lanarkshire](#)

New Lanarkshire House  
Dove Wynd  
Strathclyde Business Park  
BELLSHILL ML4 3AD Tel: 01698 745454 Fax: 01698 842211

[Scottish Enterprise Renfrewshire](#)

27 Causeyside Street  
PAISLEY PA1 1UL Tel: 0141 848 0101 Fax: 0141 848 6930

[Scottish Enterprise Tayside](#)

Enterprise House  
3 Greenmarket  
DUNDEE DD1 4QB Tel: 01382 223100 Fax: 01382 201319

**SCOTTISH EXECUTIVE**

[www.scotland.gov.uk](http://www.scotland.gov.uk)

The Voluntary Issues Unit takes forward the co-ordination of voluntary sector issues within the Scottish Executive and the development of general Executive policy in relation to the sector as a whole. This includes the Scottish Compact, which sets out the principles underlying the relationship between Government and the voluntary sector in Scotland. Associated Good Practice Guidance covers funding, consultation, partnership working and policy proofing and applies to all Scottish Executive Departments, Agencies and NDPBs. The Unit's other objectives include developing policy on volunteering, the Active Communities Strategy and developing more strategic approaches to voluntary sector infrastructure and to voluntary sector funding. "A Guide for the Voluntary Sector

to Scottish Executive Grants” is available online (or by contacting the Voluntary Issues Unit (tel: 0131 244 3649). The guide is updated in July / August each year. You can access the 2005-6 guide at [www.scotland.gov.uk/Publications/2005/08/2291032/10336](http://www.scotland.gov.uk/Publications/2005/08/2291032/10336)

The Scottish Executive periodically reviews its direct funding of the voluntary sector. To receive the most up to date information contact:

Voluntary Issues Unit, Development Department, Scottish Executive, 3H Victoria Quay, Edinburgh EH6 6QQ (tel: 0131 244 1824 / e-mail: [viu@scotland.gsi.gov.uk](mailto:viu@scotland.gsi.gov.uk)).

### **SCOTTISH GRANT MAKING TRUSTS GROUP**

The group was formally established at the end of 2000 by 18 trusts operating in Scotland who have a significant administrative base or grant making programme in Scotland. Five working groups have been established to look at issues of interest to grant making trusts in Scotland and beyond (Black and Ethnic Minorities, Linking with UK Trusts, Charity Law Reform, Linking the work of ‘smaller’ trusts and Evaluation / Monitoring).

c/o Fraser Falconer, BBC Children In Need Appeal, 5 Queen Street, Edinburgh EH2 1JF (tel: 0131 248 4225 / e-mail: [fraser.falconer@bbc.co.uk](mailto:fraser.falconer@bbc.co.uk)).

### **SCOTTISH NATURAL HERITAGE (SNH)**

[www.snh.org.uk](http://www.snh.org.uk)

SNH works with others to protect and improve Scotland’s natural heritage and to help people understand, enjoy and care for it. They offer grants to help others to do this as well.

Headquarters (there are numerous regional offices listed on the main website)  
12 Hope Terrace, Edinburgh EH9 2AS Tel: 0131 447 4784 email: [enquiries@snh.gov.uk](mailto:enquiries@snh.gov.uk)

### **SMALL BUSINESS GATEWAY**

[www.bgateway.com](http://www.bgateway.com)

The website includes information on how to best devise a development plan for your business. An outline business plan is included, which can be downloaded, along with information on how to lay out a plan for the primary purpose of raising external funds. If you would like help in completing your business plan or would like an impartial advisor to look over your finished plan, please contact your local Small Business Gateway (tel: 0845 607 8787 to find your closest one).

### **SENSCOT**

[www.senscot.net](http://www.senscot.net)

Social Entrepreneur Network, Scotland. Senscot maps social enterprises across Scotland and provides advice, support and encourages the set up Social Enterprises in Scotland. There is a weekly email newsletter, which connects subscribers to case studies, research and a variety of services to help network existing organisations as well as people wishing to start up new business.

54 Manor Place, Edinburgh EH3 7EH

0131 220 4104 E-mail: [mail@senscot.net](mailto:mail@senscot.net)

## **SOCIAL INVESTMENT SCOTLAND**

[www.socialinvestmentscotland.com](http://www.socialinvestmentscotland.com)

Will provide loan funding for social economy organisations that want to set up or expand their services. Business development support will also be available from the Small Business Gateway (see above). The Fund was launched in September 2001 and is administered locally through organisations such as Community Enterprise Limited (CEL) and Developing Strathclyde Ltd. (DSL). A limited number of loans may also be available direct from Social Investment Scotland. Contact SCVO, CEL, DSL or your LEC to find out more. The fund can also be contacted direct (tel: 0141 228 2435).

## **SOUTH OF SCOTLAND EUROPEAN PARTNERSHIP**

[www.sosep.org](http://www.sosep.org)

The overall aim of the South of Scotland European Partnership is to ensure that the Objective 2 Programme achieves the best possible economic impact within Dumfries and Galloway and the Scottish Borders.

24 Nith Place, Dumfries DG1 2PN (tel: 01387 251 360 / e-mail: [sosep@dumgal.gov.uk](mailto:sosep@dumgal.gov.uk)).

St Mary's Mill, Level Crossing Road, Selkirk TD7 5EW (tel: 01750 725 104 / e-mail: [dwands@scotborders.gov.uk](mailto:dwands@scotborders.gov.uk)).

## **SPORTSCOTLAND**

[www.sportscotland.org.uk](http://www.sportscotland.org.uk)

**sportscotland** is the national agency dedicated to promoting sporting opportunities for all Scots at all levels, whatever their interest and ability. **sportscotland** distributes National Lottery funding for sports activities, provides guidance on securing sponsorship and administers the Sportsmatch scheme.

Caledonia House, South Gyle, Edinburgh EH12 9DQ (tel: 0131 317 7200 / fax: 0131 317 7202 / Lottery Fund: 0131 339 9000).

## **STRATHCLYDE EUROPEAN PARTNERSHIP**

[www.wsep.co.uk](http://www.wsep.co.uk)

Administrators for the Objective 2 European Structural Funds grants in Western Scotland.

94 Elmbank Street, Glasgow G2 4DL (tel: 0141 572 4400 / e-mail: [sep@wsep.co.uk](mailto:sep@wsep.co.uk)).

## **TAXAID**

[www.taxaid.org.uk](http://www.taxaid.org.uk)

A charity set up to offer free tax advice to people in financial need, promote public understanding of tax and press for a simpler and fairer tax system. TaxAid is also happy to help CABs and other voluntary agencies.

Linburn House, 342 Kilburn High Road, London NW6 2QJ (tel: 020 7624 3768).

### **TIMEBANK**

[www.timebank.org.uk](http://www.timebank.org.uk)

TimeBank is working closely with the voluntary sector to help more people volunteer, right across the spectrum of community life.

TimeBank, The Mezzanine, Elizabeth House, 39 York Road, London SE1 7NQ (tel: 0845 601 4008).

### **VOLUNTARY ACTION FUND (VAF)**

[www.voluntaryactionfund.org.uk/](http://www.voluntaryactionfund.org.uk/)

VAF is a trust which provides grants to assist voluntary projects in Scotland. It aims to promote social inclusion through providing opportunities for unemployed people to volunteer.

Comely Park House, 80 New Row, Dunfermline, Fife KY12 7EJ (tel: 01383 620 780 / fax: 01383 626 129).

### **VOLUNTEER DEVELOPMENT SCOTLAND (VDS)**

[www.vds.org.uk](http://www.vds.org.uk)

The representative voice for volunteering in Scotland. VDS operates the Primary Care Volunteering Grants Fund, a new £200,000 per year fund to develop the roles and responsibilities of volunteers within Primary Care settings.

72 Murray Place, Stirling FK8 2BX (tel: 01786 479 593 / e-mail:

[information@vds.org.uk](mailto:information@vds.org.uk)).

### **WALES COUNCIL FOR VOLUNTARY ACTION (WCVA)**

[www.wcva.org.uk](http://www.wcva.org.uk)

The national umbrella body for the voluntary sector in Wales.

Baltic House, Mount Stuart Square, Cardiff CF10 5FH (tel: 029 2043 1700 / e-mail:

[enquiries@wcva.org.uk](mailto:enquiries@wcva.org.uk)).

## **PUBLICATIONS**

There are a number of key reference books that are published annually and list the current criteria of Funders in both the corporate and Trust sectors. Most of them are available on line by subscription as well, the advantage being that they are updated during the year. The list is continuously being added to and changed which makes it impractical to list all the current offerings, however the main publishers of these directories and other useful information for the voluntary sector are below.

It is worth looking at their other books as well as they include a number of very focused practical 'how to' type guides on strategic planning, seeking sponsorship, writing applications etc.

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### **CaritasData**

Paulton House  
8 Shepherdess Walk  
London N1 7LB General Tel: 020 7566 8283 Email: [enquiries@caritasdata.co.uk](mailto:enquiries@caritasdata.co.uk)

### **Directory of Social Change**

London office  
24 Stephenson Way  
London NW1 2DP  
Tel: 020 7391 4800 Fax: 020 7391 4808 email [publications@dsc.org.uk](mailto:publications@dsc.org.uk)

Federation House Hope Street  
Liverpool L1 9BW  
Tel: 0151 708 0117 Fax: 0151 708 0139 [north@dsc.org.uk](mailto:north@dsc.org.uk)

### **Hollis Publishing Ltd.**

Harlequin House  
7 High Street Teddington  
Middlesex TW11 8EL  
Email [orders@hollis-pr.co.uk](mailto:orders@hollis-pr.co.uk) Tel 020 8977 7711

### **A selection of their regular publications include:**

#### **CAF Directory of Grant Making Trusts (published every other year)**

Contains details of the location, policies and objects of over 2,500 grant making bodies, each with the potential to give at least £20,000 annually.

#### **Charity Trends ( Caritas Data annually)**

This publication has the most recent research on the voluntary sector UK wide. It includes where organisations get their funding from, how much different funders give (and to what causes) and a wealth of other useful 'big picture' statistics about philanthropy in the UK



DSC Guide to the Major Trusts Series (new editions usually published every year)

Volume 1 (top 300 UK trusts) -

Volume 2 (next 700 UK trusts) - Volume 3 (a further 400 UK-wide trusts and major trusts in Scotland, N. Ireland and Wales)

The Grant Making Trusts CD-ROM combines all the trusts in DSC's database with those in the CAF Directory of Grant Making Trusts

Directory of Scottish Grant Making Trusts

Information on approximately 500 Scottish-based grant making trusts.. Amendments are posted in Publications section on SCVO's website ([www.scvo.org.uk](http://www.scvo.org.uk)).

Hollis Sponsorship and Donations Year Book

This yearbook will provide you with information to locate, over 1,000 top UK companies which use sponsorship as part of their marketing strategies, or provide donations as part of their corporate citizen policies.

**Journals**

Third Sector Weekly, Haymarket Publishing. For 'Charities, Voluntary Organisations, Social Enterprises', but with a top 3,000 charities focus.

Subscriptions £103.40 p.a. (£79 registered charities), Oct 05. Free to Institute of Fundraising members as part of membership

Subs address: PO Box 270, Southall, Middx, UB1 2WH, phone 020 8606 7500.

Editorial: 174 Hammersmith Road, London, W6 7JP, phone 020 8267 4955, email: [thirdsector@haynet.com](mailto:thirdsector@haynet.com)

Charity Finance Monthly, mainly covers finance issues but in a broad way, plenty on investment and law. Used to be called NGO Finance. £90 for one year charity subscription (at Oct 05). Contact Plaza Publishing, 3 Rectory Grove, London, SW4 0DX, phone 020 7819 1200, email: [rcoley@charityfinance.co.uk](mailto:rcoley@charityfinance.co.uk)

Charity Times Published approx. every 6 weeks (8 times a year) - a fairly general look at the sector. £119 (£79 charities) per year (at Jan 06). Also sector news updates by email every couple of weeks. Perspective Publishing, 402 The Fruit & Wool Exchange, Brushfield Street, London, E1 6EP, phone 020 7426 0101, email: [joelw@perspectivepublishing.com](mailto:joelw@perspectivepublishing.com); editorial: [peterd@charitytimes.com](mailto:peterd@charitytimes.com)

VoluntarySector - used to be NCVO News. Published ten times a year. Free to NCVO members, £25 or £35 for other voluntary organisations depending on size

**Funding For Change** has replaced Trust Monitor and Corporate Citizen magazines with the quarterly journal Aims to "keep you up to date with funding sources across the board". £40 to voluntary and community organisations, ISSN 1 479 330X. Published by the Directory of Social Change

**Lottery Monitor** Guide to Lottery funding issues. 10 times a year, £260. Also access to awards database, and helpline. From same publishers: **External Funding Bulletin** on project and partnership funding. Electric Word plc, 67-71 Goswell Road, London, EC1V 7EP, phone 020 7251 6567, email: [info@lottery-monitor.com](mailto:info@lottery-monitor.com)

[Philanthropy in Europe](#) Independent bi-monthly.

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[Professional Fundraising](#) Twice a month. £80 for annual charity sub (Feb 06). ISSN 0961 5679.

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[International Journal of Nonprofit and Voluntary Sector Marketing](#). Case studies, reviews, and peer-reviewed articles, with an editorial board of academics as well as professionals, mainly from US and UK. Now published by John Wiley and Son, subscription £90 to £245 for 4 issues a year.

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## WEBSITES

In addition to the websites already listed, here are a few others worth visiting.

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[www.access-funds.co.uk](http://www.access-funds.co.uk)

Website aims to provide up to date, free information on sources of funds for the British non-profit sector. You can register for a free monthly update by e-mail.

[www.imaginecanada.ca](http://www.imaginecanada.ca)

Imagine Canada supports Canada's charities, nonprofit organizations and socially conscious businesses and champions the work they do in communities

[www.efc.be](http://www.efc.be)

The European Foundation Centre promotes philanthropy in Europe.

[www.fdncenter.org](http://www.fdncenter.org)

The Foundation Center is a US based site with lots of advice and links.

[www.fundraising.co.uk](http://www.fundraising.co.uk)

Fundraising UK is the best website for up to date information on (mainly online) fundraising in the UK - updated frequently.

[www.fundsnet services.com](http://www.fundsnet services.com)

Mainly US website with links to some UK / international sources.

[www.fundersonline.org](http://www.fundersonline.org)

A searchable database of 470 European funders.

[www.fundinginformation.org](http://www.fundinginformation.org)

A subscription-based website with up-to-date funding information for non-profit distributing organisations in the UK. You can get a temporary password to "try before you buy".

[www.j4b.co.uk](http://www.j4b.co.uk)

This website aims to help businesses everywhere of every shape and size find out about any grants, financial assistance, subsidies and help-in-kind that may be available to them. Community organisations, non-profit organisations and charities can use the service, too. At the moment, though, there doesn't appear to be much funding information on the site.

[www.lotteryfunding.org.uk](http://www.lotteryfunding.org.uk)

This new website is intended to direct visitors new to National Lottery funding to the most appropriate distributor. It's easy to follow, gives a brief description of the various National Lottery distributors and schemes and provides links to their sites.

[www.regen.net](http://www.regen.net)

A comprehensive website on all aspects of regeneration, with information on seminars, publications, conferences, training and new initiatives of interest to anyone involved in urban regeneration, rural regeneration, community development and / or economic development in the UK. You have to become a registered user, but this is free of charge.

[www.show.scot.nhs.uk](http://www.show.scot.nhs.uk)

Scottish Health on the Web (SHOW) provides a focal point for National Health Service in Scotland websites and other related information.

[www.syfab.org.uk](http://www.syfab.org.uk)

South Yorkshire Funding Advice Bureau (SYFAB) website contains a wide range of information sheets, including a Jargon Buster and information on business planning.

[www.workwithus.org](http://www.workwithus.org)

A portal site which will act as the single gateway to Scotland's voluntary sector, with access to an extensive range of funding information.



The **Scottish Council for Voluntary Organisations (SCVO)** is the umbrella body for voluntary organisations in Scotland. It is a charitable company limited by guarantee and has existed for over 50 years

SCVO services include: weekly news and current affairs, research, policy and lobbying, conferences and seminars, training courses, information and publications, computer software, office supplies, payroll bureau, pensions, insurance policies for the sector, project development, Charity Giving Scotland and Give As You Earn, and direct links with Councils for Voluntary Service and national networks.

## SCOTTISH COUNCIL FOR VOLUNTARY ORGANISATIONS

[www.scvo.org.uk](http://www.scvo.org.uk)

[enquiries@scvo.org.uk](mailto:enquiries@scvo.org.uk)

SCVO Information Service: 0800 169 0022

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15 Mansfield Place  
Edinburgh  
EH3 6BB

GLASGOW  
3<sup>rd</sup> Floor, Centrum  
38 Queen Street  
Glasgow  
G1 3DX

INVERNESS  
Fairways House  
Fairways Business Park  
Inverness  
IV2 6AA

## **How to Raise Funds:** A Guide for Scottish Voluntary Organisations

Price: £     (£    for SCVO members)

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