

Winter Webinar Two | Grant funding and the state of play

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Amy: Hello everybody, thanks for joining us for the second in our winter webinar series. Talking today about grant funding and the state of play; what's happened over the last year and what we're seeing go forward and some recommendations. I'm Amy Stevens, I'm Chief Executive Gifted, and I'm here with Chris Goldie who's one of my fellow directors.

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I see lots of people joining us online today. We are recording the webinar, and it will be on our website on the Resources page in the next couple of days so if you miss anything or want to share with colleagues, that's where it will be. And we're doing questions and answers at the end so there will be a question session, so please do, as we go along, pop anything in the q&a. Please try and use the q&a and not the chat so that we make sure we pick it up, and we'll address as many of those as possible, as we can, at the end of the webinar.

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So, Chris is going to start us off.

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Here again talking about what we've seen in the past year, Chris.

Chris: indeed. Thank you. Good afternoon, everybody. It's been a very odd year hasn't it for all of us in so many different ways - and in our sector, the impact that COVID has had on grant makers has been very obvious to most of us who have been trying to operate during the last 12 months or so. I think if we just reflect on what's happened really since March. Yeah, the immediate reaction for most funders was to pause, reflect and then respond in the most appropriate ways, so we saw some great initiatives like London Community Response where 60 well known and lesser-known funders came together and collectively distributed 46 million pounds to affected community groups. We saw other instances like that in and around the country, we saw individual trusts, going back to existing grantees and saying, you know if you need our support now to get through this difficult period, come to us. We saw organisations like the Julia and Hans Rausing Trust, very much individually driven, i setting up a very specific £10 million survival fund, focusing on small-medium sized charities, and very importantly for a lot of us and quite negatively for a lot of our clients, but focusing entirely on core funding, suspended a lot of traditional funding streams. As a lot of you undoubtedly will have been aware, many of the big players, particularly in the capital funding markets decided they're just going to halt new applications entirely, And ,that if you were in the middle of a capital campaign, obviously that had a pretty dramatic impact on the progress that you were like to make, but you can understand why they did it. They did it because they wanted to make sure their existing grantees were able to be sustainable, survive through the pandemic, as best they could. But it did mean for a lot of clients, you have to pause applications you have to reflect on what you might be able to do and be ready to go when you can. The other factor here is that a number of grant makers also took the opportunity or have taken the opportunity to revise their strategies for the future, and to look at their criteria, to look at what they have funded traditionally,

and decide whether now is the time to make changes. This has caused further delays, obviously to a number of funders coming back on stream now, because they still haven't quite determined what it is they want to support in the future.

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What does this new approach look like? Well, undoubtedly, we've seen a much greater awareness of what we've called here 'social needs'. In other words, the lingering impact of COVID, what, you know, how have people suffered as institutions over the last 10 or 11 months? How are they likely to need funding going forward? Let's assume a much greater emphasis from a lot of grant makers on one-year grants, rather than multi-year pledges - again, perfectly understandable when you factor in. But none of us really know when the pandemic's like to finish, what the long-term impact's going to be. As I said before, there's been a greater emphasis on support for revenue projects, core funding administrative posts, projects that would simply wither away immediately were funding not to be available. It also helps to replace obviously a lot of annual income loss. A number of charities have suffered over the last 11 months and of course not necessarily because of COVID, but because of other events that have happened over the last year, there is across every sector, a far greater focus on diversity and inclusion. So, we're very clearly starting to see across a number of funders, a move towards favouring projects which have a diversity and or inclusion angle to them. So, something else that maybe needs to be factored in when you're reconsidering an application now to the funder that you may have researched 12 months ago/ 18 months ago. Be very careful to make sure that they haven't changed their criteria, haven't altered their objectives, and that your project may now not be suitable. We're also seeing a number of organisations deciding to take a stronger partnership funding approach, so this may be a result of having worked together in the early part of the COVID pandemic, but there are a number of funders now who are looking at joint applications, so maybe they're sharing applications with other funders, they're responding to requests from other funders to support an application. But again, something worth monitoring as you go through and as you focus on your particular targets. Just make sure you're clear in your own mind, how they're continuing to fund your type of project. And the final

factor here, I think, you know, we've seen a move over the last few years, amongst more and more professional fundraising grant makers, grant making organisations, to not accepting unsolicited applications. And we're now seeing an increasing move, I think, amongst a lot of funders to identify projects for themselves. Again, there are a number of reasons for this, they're not necessarily all COVID related and predominantly I think it has a lot to do with the greater professionalism that we now have within the grant making industry. But again, be very careful about where you may have researched starting a project 18 months ago, that actually you can still submit an application to a funder, as you move forward in 2021.

06:11

Amy: Okay thanks Chris. So, we'll look now at some of the big statutory funders that we've seen change that criteria through last year and what they're going to be doing in the next year. So starting with the National Lottery Heritage Fund. So last year, obviously we saw lots of immediate emergency funding come out and I think everyone will agree that the statutory funder really stepped up and supported their sectors in 2020. So, we saw their Heritage Emergency Fund which was £50 million distributed initially and nearly 1000 organisations benefiting. I think what's really interesting though is the 77% success rate with applications. Now that's actually really high for any kind of grant maker, that that number would be successful. And I think that reflects that, you know, emergency funding really was there to try and help people, and not actually, you know, an arduous process that you go through and it's not always successful, and interesting. Interestingly 29% of grants went to historic buildings and monuments so it shows how they really were affected by the pandemic.

07:22

So, the cultural recovery fund for Heritage, £92 million distributed so far. There was £67 million in round one across just over 430 organisations, and I believe there was a second round that closed in January this year, so we'll see the results of that soon. But again, really, really big one for cultural recovery, and then there's the Green Recovery Challenge fund. £40 million, on behalf of Defra, really important that

we're seeing this more and more that the sustainable environmental element coming into grant applications. And that was about kind of kickstarting recovery, post COVID. So, what's the fund planning for the year ahead? 2021 Grants for Heritage are currently open, up to £100,000. And again, that's really still remaining with a real COVID focus there. 8 February, so not long now, the next levels will open so the £100 to £250,000 and the £250 to £5 million open on the eighth of February. Now I'm sure there will have been a mass influx of applications, so do start to liaise with your local regional Heritage Fund representatives, if you're thinking about submitting your application, and they've been really clear about what their priorities are now going forwards, and that remains boosting the economy, creating jobs and skills, the health and well-being of communities and community cohesion. So projects must address, you know, one or more of those priorities.

09:05

That's a real shift and they're not just kind of shifting back to their previous grants for Heritage programme, which was all about engaging people in heritage, that was the main criteria, and obviously that's still hugely important, but really these are the four elements that must be addressed. And for me I do wonder if that will become more challenging for projects where, you know there's a really old heritage building that needs a lot of work done to it.

09:33

The real focus is going to have to be on the activities, and how this project impacts the community. Chris and I do a lot of work with clients doing lottery bids and we are always saying to clients, 'Yes, you've got the capital element. Well, how are you going to engage people?' And I think that's going to be more and more important that the activity programme, the engagement communication, etc, really fits together and has a clear impact and it's those applications that will be successful going forwards.

10:07

And again, now all projects must show that they've considered long term environmental sustainability. So, really important. And there's currently live, Heritage Recovering Resilience loans. So, they are £50,000 to £250,000. No interest repayable up to five years, and really helping organisations look at, what activities, what costs are there, that was going to generate income potential? So, sustainability, helping organisations get back on their feet and gain revenue. that closes on the 14th of February.

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And then there's the Rebuilding Heritage and Heritage Compass programmes which are kind of training programmes, currently closed for new rounds, are to be announced for registration. And this year, that's all about improving leadership, business planning, so that kind of organisational development. Then moving into the National Lottery community Fund. And so again, initially, we'll focus on emergency funding, which was great supporting those community projects that as Chris said earlier, you know, would, cease if they didn't have immediate funding. All new grants now have a pure COVID-19 focus so it must be addressing those issues that COVID-19 has caused. We've seen funders be really flexible. So, for those who were current grantees, when the pandemic hit, the fund has been really helpful and we've had lots of feedback from clients and charities who've had live grants and projects underway to say that they'd been really flexible with payments, they've even brought payments forward to help with projects, they've not been holding grantees to deadlines for reports and, you know, achieving key milestones in the project because they appreciate that there's been many challenges going on. And, also one, which I think is really encouraging and that's accepting project changes. So, the funders realised that actually some projects which were going to achieve, X, need to change that slightly now in light of a change in what is ultimately a changed world. And they've accepted that and supported organisations in going through that change.

12:25

And they've also made partnerships with lot of regional funders and charities, to direct funding in that way. So, looking at, you know, what's happening regionally this organisation knows where these funds

should be and partnering with them on that. And ultimately, we've seen a huge amount of money delivered through 2020.

12:44

So, this year 2021, they are sticking with those current priorities that they changed last year. It says quite clearly on the website that they want to support communities not just to survive but to thrive and to grow, still supporting the communities most affected by COVID, interesting to listen and learn the lessons of the pandemic, and I think we're going to touch on that later, about when we're grant writing how we use what we've been through in the last year to actually strengthen our applications and our case for support. And they really want to give a straightforward and supportive approach to funding.

13:23

So, there's a number of programmes that are currently open. Awards for All, which is up to £10,000. Reaching Communities £10,000 Plus. Interestingly, I was speaking last year to the Reach and Communities team, on behalf of a client who were about to apply when the pandemic hit. And they said, you can still apply. but you need to show that your project has an impact on the COVID situation. And then you can't reapply for that project later on. So, they were actually really good and offered me really clear advice about, do you look at your project and think, you know, can this be made COVID. Do we need to change our project, or do we actually need to sit tight and wait until funders reopen and a more flexible and go with our original project? So, bear that in mind for Reaching Communities. Growing Great Ideas, £150,000 plus which is, again, environmental, There's the hashtag 'I will match fund' and then Partnership Programmes, as well as, still open with the community fund but I think the key thing with them is that they really are sticking with that same criteria as last year, you know, realising that communities are still struggling massively and probably will do a long way into this year. And so don't see fit, to change the criteria at the moment. Chris, talk to us about Arts Council.

Chris: Well, there's obviously a theme for all the four lottery funded organisations and it really is around recovery from the impact of COVID. So, the focus for the Arts Council is Capital Kickstart for those

organisations MPO already funds, a Recovery fund similar to one mentioned previously, which is about repayable finance, and then a Capital Recovery Fund, very much aimed at those organisations who were either in the midst of capital builds or suspended capital builds or run into funding issues to help those capital projects be completed because, clearly there is a demand that these things move forward. As far as the project grants are concerned, which is the lottery funded element of the Arts Council distribution. this has been reopened now but very much refocused and it's been refocused on the present. We talked earlier, did we not, about the desire for most funders to want to deal with immediate issues. Well, that's very much what the Arts Council is doing for its National Lottery project grants. It launched in July a programme specifically aimed at funding projects that would be happening between July 2020 and April 2021, with a focus on museums, libraries, community and cultural organisations so this wasn't the funding for the big cultural organisations, this was the funding from the grassroots of the arts. Greater focus on now rather than the future, as I said, and also an encouragement for more individuals to apply as we know, that's a sector that's been particularly hit, because it's got so many freelancers in it, by the restrictions and impact of COVID - and we know that the government hasn't always supported every self-employed Freelancer over the last 12 months or so, so the Arts Council stepped in to try and support those in the arts, who are in need of support to move forward in their careers. Safe performance is really capital funding to make venues safe for people to return. So, it's not major capital funding, it's not going to change a theatre or change a museum, but it is going to enable an organisation to be able to accept people back into its doors, but in a safe, socially distanced way and it recognises that some costs are involved in that, that for a lot of organisations they simply cannot meet themselves. There's also a focus on research and development activities in other words, looking forward, how are arts organisations going to move forward from their current situation and develop their future activities. And that applies equally to both cultural, artistic opportunities, but also their operations, how can they move their operations forward, so they become more resilient when the world starts to get back to normal? So, the Arts Council very much focused around recovery and return to a safe

environment of arts activities, particularly through museums, libraries communities and cultural organisations.

17:30

If we move on then to Sport England, their immediate response was to set up their own community emergency fund and as chairman of a sporting organisation in London, we were able to apply for that and get the funding we required to cover some of the core costs that we've obviously lost through subscriptions and that was very well received and a lot of money was distributed. They're continuing with that theme now but in a slightly different way and as it says the Return to Play Fund is really the only open source of funding from Sport England, currently, and it's all about returning to play sport or do activity in a COVID-19 safe environment. There are two tiers of pure grant funding up to £10,000, up to 50,000. And they've also introduced, with the help of crowdfunding, a £10,000 match funding opportunity. So, small community clubs can raise money amongst their own members and friends, they'll match that up to a limit of £10,000, but you've got to use the crowdfunding platform. But nevertheless, a welcome scheme within the sports world where there are a lot of very small organisations who've really taken a hit, over the last 12 months. Next Tuesday Sport England will be announcing its new 10-year strategy, it previously had operated under five years strategies, and its funding streams have been linked to those strategies so we are in a slightly strange place at the moment, because we don't know, won't know until next Tuesday what the sports funding landscape is going to look like going forward. I think we have to assume that the whilst COVID remains as much of an issue as it is at the moment, Return to Play will be their priority, but it will be interesting to see next week, whether they refocus the overall strategy of sport England and therefore whether or not they will still fund community asset facilities up to £150,000 or programmes to encourage young people to participate in sport, or older people to participate in sport. So, watch this space. I want anybody who has an interest in sports related funding or has a facility that you're interested in developing over the next few years, to go back and check what Sport England announces next week because it's going to be very important in terms of your strategy going forward.

19:41

They're still not accepting major grant applications for facility projects. We have one client at the moment, wonderful project, but it is a sports project, and you know they had they felt, they're in that category of an organisation who two years ago thought they knew where their funding was going to come from. And obviously they don't. And it may well be that some of you may find yourself in a similar position at this moment in time. All we can say at this moment in time is you've got to be patient. You've got to accept that that's the way things are, but there will be funding for facility projects going forward, whatever the new strategy says, Sport England cannot afford not to fund facilities that are desperately needed, up and down the country,

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we come on to some of the private grant makers and obviously there are, as you all know, eight thousand of these in different sizes and shapes and forms. So, the purpose of this webinar, we're really focusing on some of the big hitters, those ones that a lot of us will automatically look to for funding when we're developing a big capital project. The Garfield Weston, everybody's favourite, an organisation which as we know supports across pretty much every sector can be remarkably generous has a very, very good application process, very clear, you know what they want. They have tweaked, they remained open throughout, but they have tweaked the way that they're approaching their funding. So for the moment, the focus is very much on revenue funding for those charities who they have previously supported or who support those in need across the country. So very much sticking to the COVID Relief theme. That does mean that the trustees are not looking at new applications or capital projects, unless they're almost complete, and almost complete, they mean maybe only 10% Now the funding still required planning permission in place, those sorts of things they want to be very certain that if they can make a difference and help a project get across the line at this time they will do so, What they're not prepared to do is accept applications that are maybe a year away from completion, as we know the Garfield Weston always used to support projects or advise applications once a 60-65% of

funding had been achieved. They've pushed that out even further to capital projects now. So if you've got a big capital project, and you have the Garfield Weston pencilled in as one of the main funders, please please please make sure that you've reached that point in your capital campaign where you can go to them and ask for support because at this moment in time, they're not going to accept an application, unless it's very close to the finish.

22:10

The Foil Foundation and other favourite for a lot of arts and education cultural organisations, they immediately responded by suspending their main grants capital programme which was very frustrating for me, because I'd gone through all the process of conversations with David Hall, setting up an application for November, 2020, and that's had to go on the back burner and sadly is on the back burner now, probably until the autumn of 2021. This means that they're not accepting any major capital new applications for more than £75,000, and we know that's a real issue. They have and are accepting applications below that number, but with some very specific criteria and those specific criteria link back to what we said earlier about recovery, operational costs, adaptation costs, things that are going to enable organisations, places to reopen safely in the next few months, rather than long term building projects. And that applies to both everything under £75,000 but also to their small grand scheme as well. The Wolfson Foundation another favourite for all of us, also closed its programmes for most of 2020 and only really reopened its main funding programmes in the back end of November. Now, what are we faced with there? They haven't really changed what they're doing, but obviously they are about to and I know from personal experience, they're under an absolute avalanche of applications made in late November, December, early January, for a round one move to round two decision at the end of January, and the first real meeting of that trustees in June next year. So, for those projects that have been waiting, and are desperately keen to get money in by June, or get confirmation of money in by June, there's been this mad rush to get to the Wolfson, and the Wolfson are, and again on very recent personal experience, they're coming back with a lot of questions about financial sustainability and security that you need to be prepared for. So they want from us, rather than just accept the most recent

audited accounts, they want to know what you've been doing in 2020 and how your finances are looking and you can imagine that what they're now doing is really trying to work out whether organisations that they choose to fund, are genuinely sustainable going forward. So if you are thinking about applying to the Wolfson, or you have already applied to the Wolfson, please make sure you've got the most up to date financial information available to you.

24:34

The Wellcome? Obviously for a lot of people on this call, probably not particularly relevant because the priorities for the Wellcome have always been around research funding into health medical welfare, but they're an example of an organisation that's using this opportunity to produce a new strategy for their research funding. In other words, how can they respond to events that have happened as a result of COVID and produce a strategy that's worthy of their support going forward, over to you Amy.

Amy: Thanks Chris. I think what's also interesting on the Garfield Weston is that we've seen them be a bit more proactive. So, they've always been, you know, a funder that's out there and will engage and what have you, but you know we've seen on LinkedIn for example videos of Philippa Charles, the director, you know, openly addressing people and saying, talk to us, we know you need help, and we want to talk to you about it. So interesting that we're seeing funders really start to get more proactive like you were saying earlier, perhaps, instead of the unsolicited approach they want to engage with people and learn about your project first.

25:36

So, a few more private grant makers. The Alborada trust who give to both medicine, so human medicine and animal welfare, really stepped up during COVID, supporting all elements of their criteria. And they were very proactive in reaching out and saying, what do you need, what do you need right now? So, a great approach from them. Similarly, the All Churches Trust, they launched Hope Beyond programme, which was purely about COVID and helping churches get through that time, obviously, the

majority of churches were closed for an awful long time. That's played a key role in the delivery of services and supporting the community and they saw that and gave grants specifically for that. However, unlike many others they also maintained their Heritage grants programme. So, if you're a Church/Cathedral, who were mid project for example mid campaign with as you know, a building project or what have you, they were still grant making on that level as well which was interesting, and they continued with their transformational grants programme which is about improving ministry and reach. The Leather Sellers, so one of the Livery Company, charities, really looked at what's happening now and how can we support that. So, they focused everything on homelessness, and domestic abuse, charities and causes and projects because they realised, this is where we need to direct our funds now to have the most impact. And currently still in that phase but we'll see them start to change again. As with a lot of Livery companies, always good to watch and see what their funding criteria does change, and they can be incredibly generous so good to watch those. And then obviously the local and regional funders - and we saw them really identifying priorities locally and giving to what was needed within their regions. We also saw a lot of them making grants sooner, particularly smaller funders. I experienced that as a trustee of a small charity, and we actually had one funder come back to us and say, we told you not to ask for more money for another year. But actually, we appreciate you probably need it now so we're going to make grants early this year, and really reached out and stepped up which was interesting.

28:03

This is just a graph from a recent survey that we run and thanks to all of you online who may have taken part in that. The findings of it are on our website as well. This graph is particularly from the arts, cultural and heritage sector, but I just thought it was really interesting to show the impact that particularly statutory funding had, but also all those private grant makers who really addressed the COVID situation. So, the blue bar though was those who'd seen a decrease in income. The bottom, the turquoise was unfortunately we may not survive. But, the middle one there the yellow which was 67% really interesting was, you know, initially we were worried, but actually we were saved by those COVID

grant makers who got us through that really difficult period. And we can see a way forward. And I think that just shows the importance of those grant making programmes, and that actually, the sector really did step up private and statutory and helped organisations get through that time.

29:10

So, the approach of grant makers going forward, what do we think we'll see? A question that's on everyone's lips is will we see a downturn and investment yield, and therefore, in the grants made? Who knows, quite frankly, It depends where people have that money invested. Well, you know what businesses? Where their income comes from? Will we see, when everyone is vaccinated, will we see the economy boom and investment rates increase significantly? We just don't know yet. There is a suspicion that some funders may have less to distribute. And that means we need to focus application small clearly and make sure we really do fit the criteria. I think as well, this is an excuse for a lot of grant makers to revisit their criteria, as Chris touched on earlier.

30:00

So, you know, looking at how do we operate? What difference do we want to make and what criteria do we need to have? So, that's what a lot of them are doing over the next year and have done in 2020. We're also seeing something as of a generational change in leadership. So, particularly with private grant makers, younger generations of families taking over the leadership of the trust or foundation. And with that we're seeing some difference in priorities. So quite often the younger family members and movement to more kind of you know, social action projects.

30:39

And we're seeing that quite a lot, so something to think about if you have targeted funders who, you know, maybe the next generation is coming through to engage with them, and see you know what is it they want to support and how do they want their gifts to impact the sector. And all of this, of course means that, as I say, our applications need to be clear, concise, and direct. They need to be better than

ever. Once all the non-COVID forms open again, of course, there'll be an influx of applications for those who weren't suitable for the COVID funds. So, let's focus on getting our applications as good as possible, and matching those criteria. And Chris, we're just not going to talk for a little bit about kind of preparing applications and some advice on what needs to begin there, now we know some of you are trusts and foundation specialists yourselves, so please don't think we're teaching you to suck eggs but there's a whole range of people on this webinar today, so we just want to share some of our thoughts and experience on preparing applications. Chris, I think you're muted Chris.

31:53

Chris: I was being, I was being good and muting myself so I didn't make any noises. Now more than ever, we need to make sure our grant applications are as good as they possibly can be, you know, too often, we see clients or experienced clients who have submitted an application more in hope rather than expectation, and they haven't done it properly. They've not read the guidelines, they've not planned the timing of their application, and understandably therefore the application fails, and very often it's possible to reapply, make the application stronger and you have success for what is essentially the same project. But now more than ever, as Amy has said, there's going to be enormous pressure, particularly on the larger funders to make the application stand out from the rest. So, it's really important that you plan your timetable and by plan your timetable, again, recognising that all funders are very conscious of the impact that COVID has and the uncertainty that it brings. Plan a timetable that's realistic, plan a timetable that's realistic to deliver the project when you say it's going to be delivered, because if they're going to make decisions now about funding that they're gonna distribute in the next few months, they want that funding to be used sooner rather than later. So make sure you plan your timetable, you plan your application. If you want to find out more try and contact them. Some are extremely approachable others less so. Find out whatever key information you can, such as dates what information they need, you know, keep checking websites keep checking updated criteria and guidelines because they have been changing. Really focus on what your application is all about. We know, as Amy referred to earlier with the Heritage Fund, very often, clients will come to us

because they've got an urgent capital need for heritage building, but we quickly know that that is not what excites the Heritage Fund. That's not what excites Sport England you know, just building a new sports swimming pool is in itself, not a great value for Sport England unless you can clearly prove that it's going to improve participation by those sectors of the community who were otherwise excluded. The same applies in heritage, so sadly as we know if your church roof is tumbling in, it doesn't necessarily mean that you get funding from the National Lottery Heritage fund. You might get funding from National Churches Trust and Eddie from the Trust has highlighted the fact that the NCT manages a £4000 fund created by the Wolfson, that makes repairs to places of worship, so that's something else to look at if you're in that scope, but make sure that your application really focuses on why the money is needed. And what also is most likely to meet the current criteria. And then the question is an exclusion really exclusion? Well, let's be realistic most are, you know, if they say don't fund something, if they say they don't fund capital projects, they don't fund capital projects, but there may be some areas it's worth exploring with them when you discuss your application. So don't be immediately put off by the research you do, but don't dive in, but don't assume that you can like navigate what the immediate guidelines of any application process are.

34:58

Amy Yeah, just add to that exclusion point Chris, you know, a good example is, churches, so a funder might say you know, we don't support religious causes.

35:08

So, you would initially think, okay, we're a church we can't apply, but actually you and I have both secured funding for churches from those kinds of funders, but actually we say, this project has got nothing to do with faith. This project is to do with helping this group of young children, or whatever we just happened to be doing it through the church, so that's what we mean by that, you know, don't necessarily count yourself out but as Chris said, let's not flog a dead horse, if, if you don't meet the criteria, we don't.

Chris: And by the same token, sometimes, you know, the research engine may say that a certain funder funds a particular type of project, when you investigate more deeply you discover that yeah, the private grant maker may have once funded his local church, it doesn't mean he's going to fund churches all over the country. It's a personal thing as any private grant maker will, is prone to do, they will occasionally support projects that go beyond their normal objectives. Covering letter, you know, impact is everything. Some organisations now... more and more organisations, as you know, going online and they want short, pithy, brief round one applications before they might invite a more detailed application later on. It's the digital equivalent, if you like, of the covering letter, it needs to be short, sharp to the point. Remind them why they should be supporting them, how does your project meet their criteria? Try and find out who you're writing to if you can. It's become harder online than it used to be in person but if there are personal bits that you can drop into a letter, particularly with a smaller funder, but maybe you know a quite influential individual funder, maybe there's some way you can weave that into the narrative, your covering letter so for example, you know, I recently noted your interest in such and such. I'm bringing this project to your attention.

36:51

If you've had previous correspondence with him, good or bad, make sure you refer to it, make sure that you've learned any lessons, that they may have had feedback, they may have offered you previously, if you can learn from that and show that you're responding accordingly. That's terrific.

37:06

This is a difficult one at the moment because, clearly, we want people to come and see our projects. But actually, currently we can't and I have a particular client in Warwick where that is absolutely is holding us back. It's a place that you have to see to appreciate, and yet we can't get people in to see it, and we're desperately keen for that restriction to be lifted, so we can start to engage again with individuals. We're not looking at groups, but very much try and make sure that in your covering letter,

you've always offered the opportunity for a visit, so that they can see for themselves what difference their funding might make.

Headed paper. We had one client, not so long ago, who we provided with all the relevant information to send the applications, and he forgot to put it on a headed paper. So, you can imagine those applications probably went straight in the bin. It sounds silly, but actually just make sure that you've got all your details in the right place, links to websites, making sure addresses are up to date, everything that is relevant to make sure your application isn't going to get rejected before it's even got across the first hurdle.

38:10

What you need to include; Concise, direct, inspiring; obviously your introduction needs to be this. Tell them who you are, but tell them where it's relevant to what they're looking for. You don't need to drift off into areas that aren't relevant to the application. I'm again working with a school at the moment it's a wonderful school, but it's submitting an application for grants is a state school, and it's waxing lyrical about what a wonderful school it is and not focusing on what it needs the money for. And we need to make sure that is the focus of the application. The project. What are you doing, why are you doing it? How you're delivering? What are the timescales, how does it break down? More and more grant makers are asking for more detailed funding information, you know. If you're doing a building project, they want to know what things are going to cost. How much is factored in for professional fees for example? For some, professional fees are not something they want to be seen to be supporting. So, let's try and make sure that we can be as detailed as we can in our applications, within the restrictions that a lot of the grant makers now impose about length of applications. In your conclusion, always reiterate the what and the why. But most importantly, remember what your outcomes and your impact are likely to be. There just to remind everybody here that we're very clear we understand what outcomes and outputs are? impact is measured in two ways through outcomes, which are qualitative and outputs which are quantitative. And you've got to decide; there's a competition now if we're asking

you questions, you'd be deciding which are outcomes and what your outputs are. So number one, very clearly, is good, because it's quantitative, a 100 new residents will access communities. As a result of this project, numbers two and three are outcomes.

39:53

The project will support people and will improve lives. There are no numbers to it, you're not saying how many people are going to benefit, but just be very conscious that both are acceptable. Number four, clearly is an output because you're supporting a specific number of people under a certain age. And number five is qualitative, therefore it's an outcome. Very important that you understand when you look at the funder's information, what it is that looking at when you talk about impact and its impact, ultimately, that's going to determine where they give their money. They want to know, and more and more now, we're in this post COVID, are moving into a post COVID world, where there's so much demand for philanthropic funding, outcomes and outputs are going to be really important. Impacts, which is what they both contributed to, is more, more and more what any funding application has to demonstrate.

40:42

Amy: Absolutely. So, what we're also seeing at the moment as well, is that even funders who are offering, non-COVID funding so your project doesn't have to relate to the pandemic, they still want to know how it has affected you and how you've dealt with it. So, it's really important we think about that in applications going forward, so what impact did it have one? How, how will you stay connected, so quite a few have said well you know if this continues, if next winter we'll have to socially distance again, how will your project cope with that? Have you taken that into account? Have you future-proofed the project.? So, really important to think about that. And also, they want to know, you know, how has it impacted you in the last year? And how have you overcome those challenges? And I think actually we can use that to our benefit, and say, you know, yes, it had a massive impact, you know, it resulted in x /y and Z, but we were resilient. We thought about this, we changed, we secured funding for this, and

we've come through it So we can use that to our benefit, yes it may have had a negative impact but actually it's helped us to achieve x y and Z, it might be that, you know, it made you say, we really need to address our fundraising strategy, and you've now become a more resilient organisation for it.

Chris: So, if I just come in very briefly on that point because it's such an important one. It can also strengthen the nature of the ask. You know there are a lot of organisations out there who are in the middle of fundraising for a capital project, and probably have allocated a certain amount of reserves towards that project. Well clearly, if they've been that severely impacted by the Coronavirus pandemic and their annual revenues have dropped, the demand on that reserve has become more and more focused. You can use that to your advantage to make a stronger case to support or maybe more support from a specific funder that you've already targeted. I've had a couple of good examples in the last six months where that's happened, and the funders, because they're responding to a very obvious very tangible challenge have stepped up and given us more money than we anticipated, as a result. So just be aware that you can use the pandemic to your advantage sometimes as well. Absolutely.

42:59

Amy: Okay, so a few top tips based on our kind of experiences. You know, please do stick to the guidelines, if a funder says, send us a letter of not more than two pages, they mean two pages. And that doesn't mean that you can't include a budget as an addition, for example. But don't reduce your font size to point eight, and decrease your margins to fit in more words because it will just irritate them. Be brief stick to the guidelines.

We're always asked, 'Do you ask for a specific amount?' Now as we know some funders, particularly with online applications nowadays will ask, is there an amount that you want? And, obviously, in that situation, research and think what you need. What I would always say is, when it's a more general application and there's no kind of specific request, look at what they funded previously. So, if you are a hospice, and historically, they've never given more than £10,000 to hospice, don't ask them for £100,000 pounds, unless you've built that relationship and have discussed that with them. And, you

know that they're not going to accept that because it's highly unlikely. So do your research. It's always good to give tangible examples so you know, a gift of £50,000 will enable us to do X, Y, Z. Trustees like that because they can show clear impact from the grant.

44:23

Always think about recognition, so does that funder want recognition? Do they want something named after them, does your project allow for that? Think about how you might build that in. This next statement sounds ridiculous but I have been caught short on this previously, so online applications always save a copy. I'm sure many of us have done it with an online form that you think you know. You're not used to the form, it might be a new form for you, and you click 'Submit' thinking it's going to give you your application and it doesn't, and you need to know what you've said to funders and what you've asked for. So, having been burned by this, now whenever I have an online application unless I know the funder, I create it in a Word document, I write it all in a Word document. When it's all signed off and happy, it goes online. So just, just a warning to think about getting caught out there. Really important is to provide updates. so it may be that your project is a longer burn, so let's say over 18 months you're raising a certain sum of money, and you've submitted an application to a funder in January, and you know they have a July meeting. In the meantime, perhaps you've raised £250,000 towards your project. So, update them before the meeting, showing them that progress and keeping that dialogue with them, might just be the difference between you getting the grant and not.

45:51

So, when it comes to submitting, obviously as Chris said, we get that cover letter, we need the application itself. And always, always proofread, again that sounds obvious but, you know, when there's a pile of applications if one is messy and littered with mistakes it's less likely to be successful, and we're all guilty of and suffer from, when you've read something 100 times yourself, you don't spot those typos. So get colleagues to read your work and see if we can improve and spot any errors. Accounts only where appropriate. More and more funders are now saying, you know, accounts are able to be

downloaded online, don't send them a paper pushing exercise, we can download them. Lots of funders do not like the inclusion of film, CDs, lots of additional literature. Sometimes it's appropriate to attach plans, etc. But more often than not, as Chris said, what they want to know about is the impact of your project, they don't need a plethora of pictures and DVDs to back that up.

46:53

And layout. These are a few tips we've learned from speaking to some of the major grant makers over the years. Your text should not be smaller than 11 or 12, dependent on the front and don't staple papers together. If you're submitting in hardcopy, administrators quite often have to still photocopy these papers for trustees, and it makes their life more difficult. Again, we've also been told that single side print and standard margins are approved by trustees because they write notes on the project as they're discussing each submission. And always, always include page numbers and headers with your charity name, and charity number in there. So, in piles of paper you know exactly where your application is and where they are with it.

47:44

I think we've rabbitied on for quite a while we're going to launch some questions. While Chris starts to have a look, I'm just going to launch a poll which we'd be really grateful for you all to take a look at. So the final webinar in the series is currently planned for February, but we've replaced it to March. Well yes, but it's currently still February. We realised that we planned it in half term. And so, we're going to change that date to March so more people can attend, and it was set, the webinar was 'Ask us anything' which is still an option here, but actually you know we set these topics I think back in the autumn didn't we Chris? So actually, we thought there's probably some more topics so we've got there. 'Getting back to asking', you know, how do we start to really ask again, as we emerge from the pandemic. And also 'starting that capital campaign', so if you had to stop your campaign, how do we get that moving again. So, we'd really appreciate your thoughts on those topics. And we'll use the feedback on that for our next next webinar.

I'll leave that live for another minute or so. And we'll go into some questions Chris, so we have any through?

Chris: We've got four in the q&a and one on chat so I'll go through the four. fFrst up, so Janet Fitzgerald has asked the first question: 'Do livery companies give grants to charities outside London?' The answer to that Janet is that some of the larger ones do, but very often towards related projects, so they may be related to the trade, that the Livery Company has historic links to. It may be because there is a specific regional element to the Livery Company. It may be that, you know, historically the guild started somewhere else in the country and merged with one in London. There are all sorts of reasons for that, maybe they've got some restricted funds within the channel portfolio that have specific links. Always worth bearing in mind with livery companies that the reality is there are only really a handful, a small number, who have a large amount of money to distribute, and they have all become a lot more professional in the way that they distribute funds, and therefore they're not quite as open doors as they possibly were three or four years ago.

50:06

Beyond that, I think the key question is not always about what's on their doorstep. A lot of the smaller ones still do, but the larger ones will tend to give nationally, but there may be a reason why they particularly favour certain parts of the country.

Amy: Yeah, yeah, I'd agree with that and say, I've secured Livery Company grants for organisations outside of London, but primarily there's always been a connection to a liveryman, who's recommended the charity and like Chris said it has that link back to the historical trade etc. But yes, they do, but investigation is required for each one.

50:43

Chris: Sarah Clays asked us about contacting funders, so how are we finding this in practice when funders are inundated with applications? Mediums and small trusts, often seem to discourage contact. Well, they do. The reality is and actually within, as a result of the current crisis with so many people furloughed, a lot of them have expressed and put on their websites, 'don't contact us there's nobody here'. To be honest email is the only way I think with a lot of these trusts if you can. If they don't say deliberately, you cannot contact them and you have an email address there is no harm in sending an email, but you honestly can't guarantee you're going to get a reply because you rightly say they are inundated. So, you have to work from the information that you've got in front of you and you've got to interpret that as best you can. So, you've got to think laterally, think broadly. You've got to make sure that your project matches their particular objectives, but be bold. Sometimes you know this is a time to be a little bit bold, and if it's a small funder who you are unlikely to apply to again in the near future, then there's no reason why you shouldn't submit the best possible application, even if you haven't had that chance for for a conversation. It's something you should always try and do, but if it's simply not possible, don't beat yourself up about it, because it's simply it's just not gonna happen.

Amy: Yeah, yeah, just to add on, on your last point there. When I was on a hospital project years ago, you know, we had lots of relationships with funders and did very well and then there were those, that pile where, where you know, there's nobody you can't talk to them, etc. And you just never know. So we applied, and it turned out that one of the trustees had actually been treated at the hospital, completely unbeknown to me in the fundraising department, and they made a significant gift, and now there's a long term relationship between the Charity, and that funder, because they made that initial connection So it's always worth doing if you meet the criteria, you know, we know it's a long game for some foundations and you have to be prepared to get the 'no's. But yeah. Worth a shot if criteria fits.

Chris: Carol Ward, an old friend of ours asks, 'when offering a funder a visit, maybe a virtual tour is a good intro?' You're right, Carol, of course it is. If you can do it. I just think you need to make sure that

it's the same as a presentation. If you're going to do it, make sure you do it properly. Carrying a laptop around a church or a museum, may not offer the same impact as you would get from somebody visiting individually. You may be better off putting together a really good online presentation where you can really flag up the issues and use that to, show how your product is going to improve things. I wouldn't discount it. Certainly, I think online virtual information events is something that we've talked about as a possible way forward if this continues for much longer. But I think what we haven't quite come to grips with is quite how we're going to do it in a way that's really effective and most importantly, how you can guarantee that your targets are going to attend? But we have to be creative at this moment in time, and therefore you know, if there's a way of being able to show off your project and your facility or your building or whatever it might be to a potential funder and you can do that virtually and you can do it well, then there's no harm in inviting them to have a look. Absolutely agree.

54:04

Okay, moving over to Janet I'm gonna come back to you for the second question shortly but, Alexandra O'Donnell has asked us, said she's approaching lots of smaller trusts, to help them get over the line on a project, let's say, £1000 - £5000 in donations and very often they don't have a website, they don't offer any really detailed criteria and all they want is a letter, often via a third party who are their lawyers, how best to approach this? Amy, do you want to lead on this and I'll come in afterwards?

Amy: Yeah, similar to what you were saying previously, I think Chris all we can do in that situation is do as much research as possible into what they might have funded previously, so you know you can you can reiterate why they might want to fund you you know, 'last year you funded x y and Z and therefore we believe our project will be of interest to you because blah blah blah.' And going back to the application itself. Really really focus on your impact so you know flesh out what are your outputs and your outcomes, make the application as strong as possible, and go for it. Chris.

Chris: Okay. Janet second question, 'As a small charity under £10,000 a year we can't afford to pay a fundraiser, where should we focus our efforts to source grants as the support for financial planning. It's, you know, this comes down to research, it comes down to detail but it does very much... you've used the word 'focus', that's all important. You don't have a lot of time or money to spend on this, you need to really concentrate on where you're most likely to get support, so make sure your research is really linked to what it is you do. We encourage our clients to think very broadly about when they approach a research exercise. But actually, if you're really limited on time and resources, focus on the real need. What it is you absolutely do? Don't get wishy washy around the edges. Make that the centre of your focus, rather than being too broad and ambitious in the way that you direct things. As far as support for financial planning is concerned, that's really, really difficult in the current climate, I think, you know, we have to all recognise that as a result of the COVID pandemic, in particular grant makers, more than any donors, but grant makers in this particular instance, more than any other time, want virtually immediate impact. They want to see lives that have been negatively affected by COVID, improved through their support. So actually, unless you can link that to your request for funds for financial planning, whatever it might be, then you know you're on slightly rocky ground. Janet, that's not a great answer, but it's not it's not the easiest question. Amy, do you have anything that you might want to add to that?

Amy: Yeah, two things First of all, on that last point, you know, there are some funders if you can show that actually the pandemic has made you address this and realise that you need to move forward. There are funders that are giving that kind of resilience funding, so helping you to organisational development and move forward. So, there are some out there. And also, don't forget the power of volunteers. So, yes it can be difficult to manage volunteers but over the last year, I've worked with a number of small churches who could not afford to pay a consultancy like us to prepare the grant applications. So instead, what we've done is delivered online training for the volunteers in how you write that bid? How do we move forward? So, some of what we discussed today, but in more detail, and fleshing that out. And then the volunteers are going on to prepare those applications. And, you know a

lot of these people are very skilled people, but have never worked in this sector before. So you can get resources to help you with it. Yes of course it's more challenging when you no funding resources, but it is possible. So yeah, there's always training and development with volunteers out there.

Chris: Okay, we've got a couple more questions which we'll get through as quickly as we can. So, 'do you think having a significant uplift in donations in 2020 will be seen as negative when applying for funds next year?' Amy, would you want to kick that one off.

58:18

Amy: I don't think so. And, you know, we always say success breeds success, so if it shows that you've either taken advantage of funding situations, as in quite rightly when you should have, you know, when they become available, or you have done something to, greatly mobilise your supporter base, tell people about that. So long as you're not sat on millions of pounds worth of reserves that you can't explain and you're asking for money for capital for example, then actually 'no' I think it's a positive. I think it shows that you're thriving you're resilient, and you know what you're doing.

Chris: Yeah, if you go back to what we said earlier in the webinar about more and more funders looking to support organisations, yes, they want to help organisations as they struggle, but they don't want to throw their money into, into a hole where it might disappear forever. They want to see that organisation's are resilient enough to survive the pandemic and therefore if you can demonstrate, and there's probably a very good reason why you've had a big uplift in donations. If you're in the health sector, it's, as we all know from the, the Captain Tom episode back in the start of the first lockdown, you know, there was a massive amount of support for the NHS and we know we have our doubts, ultimately, how much of that money is at the frontline, but nonetheless that was people responding as the British public's always done, to an emergency. So, if t your uplift in donations was as a result of the COVID pandemic in some way shape or form, I don't think anybody's going to hold you hold that against you, provided that as Amy says, you're not just building up a huge reserve and sitting on it and

looking for more money on top. You've really got to Justify in every application, why you need the money.

59:58

Amy: Also just Just quickly on that Chris, as a kind of point going forward, don't waste that, if you have seen a massive uptake and, you know, increase in your income and your new donor acquisition. Make sure you steward those donors now for the long term and keep them with you, because they gave to you this year for a reason, so try to keep them on board and it will help your long term to build and continue that income level.

1:00:24

Chris: Okay, and finally actually I thought it was a question but it's actually some very helpful advice from Sarah Clay to Janet's question. Second question about the 'not being able to afford to pay a fundraiser.' Sarah has made this suggestion, it says with some fundraisers being furloughed, you could try asking for voluntary support with bid writing in the short term. You could also try a small charity Coalition for resources for small charities, so maybe two things to think about there, Janet.

1:00:51

Again, may not necessarily be the right solution for you. But Sarah, thank you for the suggestion I'm sure Janet appreciates that as others will do. And that, I think is the end of our questions.

Amy: And yes, yeah. Yeah, really good point that of Sarah's, I've seen a few furloughed fundraisers on LinkedIn, reaching out and offering their services in that way, so yeah really really good point. Yeah, So that's the end of our questions. Thank you everyone again once again for joining us. As you can see our contact details are on screen. If any of you don't have a copy of our book, 'gifted fundraising' which talks about various different approaches to fundraising, email Juliana and she'll pop your copy in the post. But thank you so much once again. Any questions, get in touch with us. We will take into account

the results of the poll for the next webinar, and we'll publish that. And hopefully you'll be able to join us online again. But thank you, take care and we'll see you again soon.

Chris: Stay safe, everyone, thanks for joining us.