

# Fundraising from trusts and grant giving bodies

**Aim:** this document outlines how to research and select trusts and grant giving bodies that may fund your organisation's work. It also provides an overview of how to structure a grant application, what to include and how to submit the application to have a good chance of success.

# Fundraising from trusts and grant giving bodies

## Research

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There are a wide number of trusts and grant giving bodies including: international aid, multilateral aid, international NGOs, government grants (national and local), donor agencies, foundations and international foundations, religious foundations, company foundations.

As with any other source of funding you need to start with research. You will want to find out:

- Which agencies will fund your specific project?
- How do they prefer you to apply for funding?
- Are you likely to have any links to the trustees who might support your application?
- Who is the best person to contact or build a relationship with?
- What size grants do they offer?
- What type of grant do they offer? E.g. capital, revenue.
- What constraints are imposed by the donor as a matter of policy? There is no point applying for something that they cannot or will not support.
- What sort of projects have they supported in the past, so that you know their particular interests and can tailor your approach accordingly?
- Timing of when to apply and how long it will take to hear from them.
- Look into other organisations that have been successful with their applications.
- What kind of feedback and reporting do they ask for? Can you realistically comply with their requirements? For example a European Union or United Nations grant often involves a labour intensive reporting process.
- Will they support the same organisation twice?
- Whether they expect to get any sort of recognition or benefit in return for their support, so you can think about this before you write your proposal.

Basically find out what you can about prospective donor agencies and whether they fit with your project. If you can't find out all the information you need through research, you should get in touch with them.

Not everyone you research will match your organisations objectives, so put together a realistic list of potential donor agencies.

The following advice includes extracts from the Worldwide Fundraisers Handbook 2nd edition (2003) by Michael Norton in association with The Resource Alliance.

## **Writing a fundraising proposal**

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Writing a proposal is probably one of the most important skills in the fundraiser's repertoire. The fundraising proposal communicates the needs of the organisation to its potential supporters. And it is largely on the basis of the written proposal that many funders will decide whether or not to make a grant.

### **Planning your approach**

In thinking about how to structure a proposal, you will need to consider who you plan to approach, what their priorities and interests are, how you are going to make the approach, what procedure they have for selecting and assessing grant applications, what you need to say about yourself and what you propose to do, and when you will be submitting the application. There are several factors to consider at this stage:

**Application forms:** You should ascertain whether the donor requires applications to be submitted in any standard format, or has an application form which has to be completed. If they only want a two page application only write a two page application, and if they have a template, use it. Some donor agencies prefer you to send a brief project outline or case statement, they then decide if this matches their criteria and if it does will then ask you to submit a full proposal.

**When to apply:** Do they only accept applications at a certain time of year? Be organised and prepare a calendar for your applications so there is no need to rush. The process will differ for each agency, and some will be much more labour intensive than others so make sure that you are prepared.

**How many donors you plan to approach:** If you are sending the proposal to a large number of donors, you want to try to make it personal to each. The simplest way of doing this is by having a standard proposal accompanied by a covering letter, including all the points of previous contact and how the project particularly fits within the donor's guidelines and current interests.

**The size of the donor:** Large aid and donor bodies, major foundations and government funding programmes will be interested in a great deal of detail and evidence of need and professionalism in delivery. Smaller donor bodies, which include smaller foundations and many companies, just do not have the time to read through a mountain of paper. They want everything shortened and simplified - a page or two at the most.

**The likelihood of success:** The larger the grant applied for and the greater the likelihood of success, the more it is worth putting time and effort into the application. Conversely, for smaller sums or where the chances are low, then you need to limit the time you put into the application if you are to be cost-effective. It is a general principle of fundraising that it is better to put more effort into fewer things than to scatter your efforts widely.

Make sure you are clear about these details so that you do not waste your own time, and give a poor impression of your organisation, by ignoring their basic guidelines.

## Targeting

Who you send your proposal to will depend on things such as when you need the money, how much do you need, the type of project you are raising funds for:

**Urgency:** If you need the money really urgently, then it may be best to approach those who have already supported you.

**Scale of need:** If you require large sums of money, then you have a choice. You can either apply for a few large grants from the larger donors who are known to be interested in your sort of work or who have already supported you, or from some government source. Or you can mount a wider appeal seeking a range of large and small donations from a larger number of donors.

**How many donors to approach:** Donors are often interested to know how many other people have been asked and whether others have already agreed to give. The general rule is that only a careful selection should be made, based on an assessment of who is likely to be interested. If this is made clear in the proposal, those receiving it are more likely to take it seriously than a proposal mailed out widely.

**Type of project:** New projects and new initiatives are more likely to be of interest to foundations and companies than simply contributing to the running costs of the organisation or providing a basic service. There is a skill here in constructing your proposal to make the work seem new and exciting, addressing matters of current concern in an innovative way. This is often simply a matter of presentation.

**A personalised approach:** You should try to personalise the approach as much as you can, as the personal approach is likely to be far more successful:

- Refer to previous contacts and any previous support.
- Match your proposal to their interests as evidenced by their stated interests and policies or other grants they have made.
- Try to make them feel that you are writing to them personally. This is obviously much easier to do if you are writing individual letters to just a few donors.

## Content

Your proposal will differ with each application, however ensure that you structure your document carefully into clearly titled paragraphs and make the order logical. Generally the funder will want to receive the following:

**Executive Summary:** A brief two sentence outline of how much you are applying for, and what you would like them to fund.

**About your organisation:** A brief outline of your organisational vision, mission, aims and objectives. You can also include here your legal status, charity registration number, etc. You also need to show you are credible. If your organisation is new or the funder has had no previous contact with you, they may well want to ask who you are and why they should entrust their money to you. This can be overcome by:

- Providing CVs of the key organisers and others involved;
- Where you have a well-connected committee or patrons, list their names; or mention the support you have previously received from other major donors or a government body, which will help provide reassurance.

- If you have obtained press coverage, you can include the clippings.
- If you have had an evaluation done on your work, then that might provide ammunition.
- If you have received feedback from users, experts or others, then you can mention this or include a direct quote.

Include information which helps create the impression that you are well established, and worth investing in.

**The objectives of your project:** Clearly state the animal welfare need and set clear goals and objectives. Focus on a specific problem and demonstrate your knowledge of the issue. If the problem itself is not widely recognised, references to other respected reports or endorsements by prominent people will help. Also explain why the animal welfare need is important and urgent and what are the consequences if nothing is done? It is important to back up your claims, to the extent of the need and to the effectiveness of your methods, with facts and figures, rather than in generalities. Everything may be desperate, urgent, important or unique; but you need to prove this. Try to include a few selected facts and figures in your proposal, and you can, if you want, also provide a wealth of detail in a background paper attached as an appendix to the application.

**A description of your project:** What working methods will be used to meet your objectives? What are the short and long-term operational plans? What are the expected outcomes and achievements of the project? Also include why it is appropriate that your organisation is doing this particular work. How does this tie in with your organisational objectives? Why is the method you have selected the best or the most appropriate or the most cost-effective? Include a project plan or time line. Also explain why and how you believe your project fits the funding agencies' criteria, assert your belief in the degree of fit and tell them why they should fund your project.

**An outline of who the beneficiaries are:** Emphasise benefits that impact the health, safety or economic situation; e.g. encouraging tourism, increasing employment opportunities, education, reducing health problems etc., as well as the animal welfare benefits. Are there any particular geographic or socio-economic factors which make it important to do something in the area where you plan to work? If you can include case studies and examples of how animals have been saved or how people have been helped by you, and what they have gone on to achieve as a result of your help, then this will demonstrate clearly that you are effective in helping - which is what most donors are interested in supporting.

**The potential risks and your planned risk management:** Make it clear here, that you have thoroughly researched the project and are aware of internal and external factors that could impact upon your project, and how you will address these issues if they should come up. It is also worth mentioning your track record in this area of work. Why are you the right organisation to do something about this particular problem, why are you likely to be successful? You can demonstrate this by showing some of the skills and resources you will bring, as well as describing your previous successes.

**The sustainability of your project:** What will happen when the funding runs out? Will the project continue on a sustainable basis? Or will you be able to identify and develop alternative sources of funding? Or will the project come to a natural end? If you can show that the project will become self-sustaining in some way then the sum requested will represent to the donor an investment which will continue to bring benefit far into the future.

**Leverage:** Where possible it also good to describe what the grant that the donor provides will achieve over and beyond the actual sum of money given? For example:

- Will you be able to mobilise the efforts and energies of volunteers, and how much value will this add to the work being done? Often this will be considerable and you can show how much you can achieve with a relatively small sum of money.
- Will you be mobilising the local community, and how are they involved? Again, their involvement will make your project that much more effective.
- Will you be collaborating with other organisations and agencies, bringing in additional skills and resources?
- What are your plans beyond the project, to build on and develop from the work you plan to do during this next phase? This should at least be considered, even if you have no firm plans at this stage.
- If the work is innovative, what plans do you have for dissemination, and is it possible that your success will influence how others address the problem?

**Measurements of success and review mechanisms:** How will you measure and report on the achievement of your objectives? Who will do this? What are the likely outcomes?

**Your budget:** Your budget will always be carefully scrutinised by potential funders, and needs to be clear, complete and accurate and you must be able to justify all the expenditure. Most donors will not be interested in the small details of your stationery or postage bill. What they will be interested in are the major areas of expenditure and income. You should identify capital or other one-off costs, salaries, overheads and any other major operational costs.

Similarly, income estimates will show the money you expect to generate from the project itself or through fundraising. Beyond this, you may need to show the way in which the money you need in the medium term is going to be raised, say over a period of three years. This may require a summary income and expenditure statement and a capital expenditure statement, both spread over a three-year period. Additionally, you will need to supply your organisation's audited accounts for the latest year for which they are available.

It may sound obvious but make sure that you have included absolutely everything. Go through your plan in detail. Don't ask for too little.

**The ask:** You need to decide how much to ask the donor agency for. You will have found out the sort of level of grant that the particular donor usually makes through your preliminary researches. Very often this will be less than the total you need to raise. In such cases, you will need to approach a number of funders, asking each to contribute part of the total. There are several approaches to this:

- You can approach, say, three different sources, and ask each to contribute one third of the total, or an appropriate proportion, depending on their size.
- You can break down the project into separate components. Each of these might become the subject of an application to a particular donor, and in each application you will highlight the particular importance to the project of what you are asking that donor to support, as well as the value of the project as a whole. Or you can give a range of options to the donor and a range of budgets to give the funder more options. For example; A donation of X will allow us to do Y which will result in Z.

Then there is the matter of strategy. Do you approach all your prospective donors at the same time? Or do you approach one of them first, hoping to gain their support, before approaching the others? This is something that only you can decide. Whatever you decide, it is important to have a funding plan, and to explain to everyone you are approaching how you

propose to raise all of the money you need. And you must be clear about what has already been committed to the project.

And don't forget to outline when you will need the money.

### Tips for writing the proposal

**Length:** There is a lot of information you could put in. If you put it all in, your application would be too long for most funders. For a substantial proposal, this may well be appropriate. For less complicated projects, keep the length to a minimum. A page or at most two pages will normally be sufficient; and you can append more detailed information or a photograph or technical information to the proposal, if you feel that it will be of interest to the donor.

**Language and jargon:** Many applications are frankly extremely boringly written and boring to read. If you have the skill to do so, try to write the application in a lively upbeat way, concentrating on your strengths, the opportunities, the desirable outcomes and your hopes for the future. This is far better than the flat language that most reports are written in. The application is a selling document - selling the idea of supporting your project to a potential donor. Points to avoid are: long sentences, long paragraphs, meaningless words and jargon, which mean something to you but nothing to the reader, and waffle. Far better to have short words, short sentences, short paragraphs, bullet points and bold text to highlight key features, headings and subheads to indicate the different parts of the application. Avoid using the passive tense. As much as possible try and match the vocabulary used in the companies application documents.

**Lastly:** Don't forget to complete each section as factually and as honestly as possible.

## Checking Your Proposal

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**Does it make sense:** The best advice is to get someone else to read what you have written before you send it off. The best person is someone who knows little about your work, as that is the position of most of the people you will be sending your application to. They can ask for explanations and challenge assumptions where things seem unclear to them.

**Will it be successful:** Read the application guidelines very carefully and note the specific requirements. Create a checklist of their criteria and try scoring your application against it. But do not let the funder's criteria dictate the structure or the content of your project.

**Keep copies:** Keep copies of each application and record the dates that they were sent, and any communication you have with the trust.

**Apply:** Make sure you submit the application on time!

**Get in Touch:** Skilled fundraisers would not consider sending a proposal out of the blue to anyone but the smallest and the most remote foundation or company. To ensure a greater chance of success, you should get in touch with the donor agency and find out who the application should be sent to, their name and job title, and also who makes the decisions and who they are advised by so you can plan any lobbying.

**Wait:** Now you have to wait. If they have given you an indication of when you will hear that's great. If not, then it's a good idea just to confirm that they have received the proposal, and ask when you can expect to hear. If you have not heard by the date given, then give them a call.

If once you have submitted your proposal, they request further information, make sure that you send off the information they have requested promptly, and encourage them to contact you if they need further information.

**Be prepared for a visit:** Some donor agencies, especially if they have not supported you previously, may want to visit your project. This is a great opportunity to show them what you do, how important your work is, and how important the project is. However, make sure that your project is ready for a visit.

**If they say yes:** Fantastic! Don't forget to thank them. Now the project work and the reporting work begins.

**If they say no:** Don't despair. Take the opportunity to call them and find out why you were unsuccessful. Is it worth applying again and when? It may be worth staying in touch with the organisation by sending them the occasional newsletter or inviting them to see your project. A no does not necessarily mean that you give up, it could be for any number of reasons that you can easily fix.

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