

Getting it right – a guide to
fundraising for the VCS in
Westminster



where volunteering and
community action
transform lives

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1.2 Introduction

Welcome to the Guide to Fundraising.

This pack has been reproduced by One Westminster. It is based on one previously developed by Voluntary Action Westminster in conjunction with the Westminster Funders Network.

The aim of the pack is to provide a basic guide to fundraising - to give you some helpful tips and checklists to refer to when fundraising.

There is also a list of funders specific to the borough of Westminster with accessible information about what they fund and how to go about applying; and a list of some other key funders nationally, which we hope you will find useful..

Please remember that funders do change their deadlines and priorities from time to time so it's always best to check with the funder directly before you decide to apply.

For any further information or for support with your fundraising activities, please contact the One Westminster Organisation Support team.

support@onewestminster.org.uk

**One Westminster
37 Chapel Street
London
NW1 5DP**

**Tel: 020 7723 1216
www.onewestminster.org.uk**

1.3 A Guide to Fundraising

1.4 Planning your project

Before you start, think things through. You will then be in a much better position to start fundraising. Here is a list of questions that most funders will want you to answer. Sometimes it's also useful to talk this through with a colleague as other people can make you think about things you haven't thought of. You can also use this list to develop your own project plan.

Agree with colleagues and trustees, and then write down all the answers before you do anything else!

- What you are going to do?
- What difference it will make to the people or organisations that your project will benefit?
- Who / how many people will benefit?
- How you are going to do it?
- When you will do it?
- Where you will do it?
- Who will be responsible for the project?
- How you will know you've made a difference to the people or the organisations your project will benefit?
- Do you have the resources as an organisation to manage this project?
- If not, what would you need?

1.4.1 Identifying and demonstrating needs

You must show that there is a need for your project and that your project is a good way of meeting it. The three points you should think about are:

- What needs do your community or users have?
- How do you know they have these needs?
- How will your project meet those needs?

Sometimes applications for funding fail - not because funders do not believe that the need is there, but because funders are not convinced that what you want to do will solve the problem, or that your proposed project is what people want. So it is important that you answer these questions clearly, and explain how you know this.

How much information you need to give usually depends on how much money you want. If you are looking for a relatively small grant you could conduct a survey among your existing members or users, asking them for their views on the new project.

For a larger grant, you may need to do a fully costed options appraisal which explains the different options for delivering your project, perhaps with some research into different ways of meeting the need. You can then explain which option you decide is the best and why.

Identifying needs - Ideas check list

When developing a new project it's important that you can demonstrate clear needs to the funder you are applying to. Here are some ideas for consultation with your client group / community to identify needs.

1. Questionnaires

When compiling a questionnaire it is important that questions are focused and clear.

2. Focus Groups

Focus groups can be structured to bring together a representative group to discuss an idea. This group can be brought together at regular interviews.

3. Coffee mornings and other informal gatherings.

One way of consulting is to go to where people are and where people meet such as doctor's waiting rooms or community centres.

4. Outreach work

Outreach work can be done either door-to-door or selecting random addresses. You can also outreach into community buildings such as community centres, and youth clubs.

5. Round table discussions

The concept behind a round table discussion is that people are brought together in an environment where all opinions and views are given equal weight and all participants are encouraged to contribute, usually on a one-off basis.

6. Creative participatory consultation methods

This could include ideas such as;

Mapping: Using a map of an area, ask people to place coloured stickers on the map to indicate their views about areas where people feel safe or unsafe, places where community and youth buildings should be. Mapping can be easily adapted to your specific needs.

Love/Hate lines: Draw a line with love on one side and hate on the other and ask people to place a mark on the line for their support of an idea that is presented to them.

Collage: Using a huge piece of paper hang pens and ask people to record their comments and views on a particular idea.

7. Stalls in local shopping centres, events, community buildings, youth clubs etc.
8. Comments and ideas boxes.
9. Research

Organisations often conduct research into needs through interviews, gathering statistics etc. One way of doing this is to employ an independent person such as a consultant to carry out the research for you.

However, consultants can be expensive and will not necessarily be able to do this better than you so first of all think, is there someone in your organisation who can do this research?

And do we already have access to the information we need, for example, through existing research such as the City of Westminster Ward Profiles? Available here:

<https://www.westminster.gov.uk/ward-profiles>

1.4.2 How will your project make a difference?

If you have been running a project or organisation for some time, you probably know what is needed and the difference that this makes, but remember that funders will be looking for you to demonstrate this on paper, and will usually not know anything about your organisation. When you are explaining the difference that your project will make, try to imagine the person reading it knows nothing about you, your organisation, the people you benefit, or the issues you face. It's not about writing more information but about being very clear and to the point.

Outputs and outcomes....

Some funders will ask you to demonstrate the difference your project will make by stating outputs and outcomes. This can be quite confusing if you are new to fundraising so here is a quick explanation:

Outputs = number of people benefiting / activities / services etc. Outputs are figures that can be monitored throughout the project, for example:

- 50 children attending the supplementary school each week
- 20 women benefiting from IT training

Outcomes = the outcome you expect to see as a result of your project, for example:

- Increased confidence of members
- Increased awareness of employment and training opportunities

Be realistic about what you can achieve! There is no point setting yourself up to fail and funders will usually prefer to see realistic and achievable outputs. If your outputs are quite low for a reason, always explain this. For example it may be that you are delivering a project to people with high needs which means that your project can only work with a limited number of people at once.

1.4.3 Monitoring

Getting the money is only the beginning, once you have secured funding, you will need to make sure you can report back on how the project went, and if you reached your targets. Set up systems for this from the beginning to save yourself time and energy later on. Monitoring your project can be easy once you have decided how you're going to do this and set up systems, if you don't do this you may find yourself in a position later on where you are struggling to gather the right information. The funder will also want to see how you will use this information as the project goes on and to see that you will learn from your work.

Ways of monitoring your project - Ideas checklist

1. Keep records of the people who attend your meetings or events; you might want to include their ages, ethnic origin, area in which they live etc.
2. Use attendance lists / signing in books.
3. Take photographs during projects or events; this provides a useful record which could be sent to funders.
4. Collect people's comments by asking people to write in a comments book / form about what they liked / disliked about the project.
5. Create a 'comments wall' at events by pinning flip chart paper on the wall and asking people to write up their comments / ideas. Use pictures and brightly coloured pens to make it more interesting.
6. Devise a questionnaire, asking people for their views.
7. Always give people opportunities to say what they think.
8. Meetings and annual general meetings are an ideal opportunity to collect people's views and ideas.

1.4.4 Evaluation

The overall effectiveness of a project can only be measured if there is a clear statement at the start as to:

- What are you trying to achieve?
- How will you know you have achieved it?

This involves stating clear objectives, including specific targets that will indicate achievement; such as, how many people do you aim to involve, and what do you want people to get out of the project?

Ways of evaluating your project - Ideas checklist

Once you have collected information by monitoring the work, you can begin to evaluate by asking yourselves the following questions:

1. Did we meet our goals?
2. If the goals were not achieved, why is this?
3. What did we do well?
4. What could we have improved?

Remember though, you may also achieve some useful things you did not set out to achieve! Other useful general questions to consider are:

5. Are there any unexpected positive outcomes?
6. Are there any unexpected negative outcomes?
7. How can we learn from these?

1.4.5 Managing your project

The funder will want to make sure that you are well enough organised to deliver the project. Funders need to know that you will be able to account for the money they give you and that you will be able to deliver the project the grant is paying for.

Good management means that your organisation is accountable and professionally run. Funders will typically look for the following:

- Your management committee/trustees will have close contact with your users or your community and have the skills to handle the activities involved in delivering your project. This could mean managing staff or volunteers, or managing community buildings. (Normally the funder will ask you who the members of your management committee are and what skills and experience they can bring to the project.)
- Your organisation has established procedures in place for the election of the management committee and for conducting regular meetings.
- Accountable financial systems and procedures – regularly reports to the management committee, properly prepared accounts.
- Policies and procedures that are working in practice such as, Health and safety, equal opportunities, safeguarding children and adults, and volunteer policy.
- Good structures for the support and supervision of staff and volunteers.

You may not have all of these in place immediately, but you may be able to show that you are working towards this.

1.4.6 Developing a budget and managing the money

Once you have developed your project the next step is to work out how much it will cost.

You will need to justify the amount you have asked for. For example, if you want money to pay for staff, you will need to show how you decided what the salaries should be.

Some tips:

- Make sure you have clear systems in place for monitoring and reporting on spend. If you're not sure what you need, seek advice from the Community Accountancy project <http://www.cash-online.org.uk/index.php> or from One Westminster.
- Be realistic about how much things cost.
- Build in necessary running costs such as premises, stationary, management, and publicity to your bid.
- Cost in time for planning, monitoring and evaluation.
- Match funding – always show match in-kind
- Build up reserves where possible
- If you know you will need admin support to run the project you may need to think about breaking down admin costs so that a percentage is included in project budget
- Remember to include planning time

Producing the budget

1. Make a list of all the expenditure headings (items) that you think may be needed by your organisation.

2. Make a list of all likely income headings.
3. Estimate the cost of each item of expenditure as realistically as you can.
4. Make a clear note of how you arrived at each figure.
5. Now do the same with each items of income – estimate the likely amount of income from each source.
6. Show the draft budget to people inside the organisation. Make sure you talk to those responsible for delivering specific parts of the service. Missing out a heading is the same as giving that item a budget of £0.00.
7. The budget should be presented to the management committee/trustees for their comments, alterations and approval.

Budget Checklist

To follow is a list of cost headings to think about when compiling a budget. Use this as a check list to make sure you have not forgotten anything.

Setting up an office

- Letter head, design, Desk top publishing, printing
- Compliment slips
- Business Cards
- Identification badges
- Identification photos for staff
- Envelopes, invoice, photocopy paper, note pads, biros, paper clips, staples, toner

- Cash box, staples, first aid box, post scale, franking machine
- Telephones
- Photocopier

Computers

- Set up cost – computer(s), software, printer, scanner, monitors, modem, additional telephone lines and rental, security devices, mouse, keyboard, zip drive or other back-up systems
- Recurring cost – printer cartridges, paper, e-mail and internet subscriptions, telephone charges, staff training, maintenance and repair

Vehicles - Fixed costs

- Lease payments or purchases price
- Insurance
- Road fund licence
- MOT
- Basic maintenance
- Subscription to recovery organisation
- Garaging

Vehicles - Variable costs

- Petrol
- Additional maintenance, Cleaning
- Parking
- Payments to casual drivers

Furniture

How many parts of the building need furnishing? New, donated or second? Is it all needed straight away or can it be phased in? Would trusts fund parts of the capital expenditure?

- Entrance and hallway. Signs, light, ramps, entry phone.
- Reception. Carpets, chair, notice board, receptionist desk, chair, staff / department pigeon holes
- Office. Desks, filing cabinets, chair, notice boards, room dividers, curtain / blinds, tables, desk lamps, tea coffee making and storage / fridge, staff hangers / coat hanging, shredder and bins.
- Other work spaces. Floor covering, work benches / equipment tables, seating, lighting, ventilation, cleaning materials / equipment and work equipment.
- Training / meeting room(s). Curtains / blinds, carpets, chairs, tables, flip charts, white boards, OHP, video and TV, kettle, cups, sufficient toilets for large meetings.
- Play area / crèche. Carpet, children tables and chairs, play equipment, water supply, wet area, sink fridge, children's toilets.
- Storage. Stationery, other supplies and stocks, safe equipment, library, archives.

Staff Costs

- Recruitment – Advertising, photocopying, postage, panel expenses, applicant expenses, refreshment and venue.

- Salaries. National Insurance, Pension, increment and inflation in future years.
- Staff training, external supervisors / consultants. Travel expenses
- Volunteers. Recruitment, insurance, training, travel and meal cost

Fundraising

- Staff
- Marketing
- Leaflets

Property Costs

- Legal cost
- Rent, service charges, mortgages and loans
- Heat, light, power
- Insurance
- Rates, water and sewage, refuse collection
- Cleaning
- Building works (including architects surveyors etc.) and adaptations, access issues and compliance with fire regulations and health and safety, environmental health, building and planning controls, Factories Act, Office Shops and Railway Premises Act.
- Decoration, cost of compliance with the lease including redecoration on vacation, carpets, blind, upgrade of security – shutters, locks and burglar alarms.

Office type costs

- Book keeping / payroll

- Bank charges
- Photocopying
- Postage
- Print and stationery
- Telephone and fax
- Insurance
- Hospitality
- Professional fees / consultancy
- Depreciation of equipment

Insurance

- Public liability
- Employers liability
- Personal accident or injury to staff, volunteers and management committee members
- Loss or damage to assets either on specified premise (contents) or anywhere else (all risk)

Also consider your needs for:

- Buildings insurance. Essential if you own one, or check lease re: who's responsible.
- Increased cost of working. Relates to costs following a fire etc., i.e. temporary office rent, hire of equipment etc.
- Motor vehicle insurance for volunteer drivers using their vehicles or the organisations vehicles.
- Professional indemnity re: giving poor or wrong advice that the organisation might be sued over.

- Money insurance (Is there a lot of cash being handled)
- Fidelity bond. Insuring against dishonest staff

Compliance costs / management and administration

- Audit or independent examination
- AGM and Annual report

Direct costs of the service you will be providing

- Specialist equipment
- Recruitment and training
- Publicity and marketing
- Subscriptions, membership and publications
- Wages / salaries and employers NIC., pension contribution, volunteer expenses.
- Insurances
- Materials
- Travel
- Clothing
- Cover for sickness / maternity
- Telephone communications
- Translation
- Property costs – rent, heat, light, power

1.4.7 Devising a fundraising strategy

- Plan ahead – develop a yearly plan for fundraising
If you know funding for a project is going to run out, don't wait till the last minute. This may sound obvious but it's easy to end up doing things at the last minute! Funders can often take 6 months or more before they can give you a decision so it's best to work out a plan for the year working backwards from the time you know you will need funds.
- Don't put all your eggs in one basket!
Again, this sounds obvious but make sure you have more than one option.
- Have a long and short term strategy
- Gather information that you can use for any bid – i.e statistics, research docs, feedback from users.
- Make sure you are on mailing lists / networks so that you receive information as early as possible about new funding initiatives.

Current policy agendas

- Do your research about the funders priorities
- One Westminster can advise on current policies if you're unsure
- Don't stretch your project to fit into policy, you will only struggle later

Do's and don'ts in fundraising

Do...

- Plan a strategy
- Plan ahead
- Believe in what you're doing
- Tailor your application to the funder
- Keep records of everything
- Prepare realistic / accurate budgets
- Be concise and specific
- Establish your credibility
- Develop long term partnerships
- Say thank you

Don't...

- Send a duplicate mail shot
- Ask for unrealistic amounts
- Assume funders will instantly understand the needs you are meeting
- Make general appeals for running costs
- Use jargon
- Beg
- Make statements that are untrue
- Assume that funders don't talk to each other

Checklist

Before you apply

- Before you apply for a grant you should check your organisation is eligible to receive one. Each funder is different and will have their own criteria for organisations applying for funding. Check their guidelines before you start and if in doubt contact them and ask!

Before you submit your application

- Have you proofread your application form?
- Check that you have answered all relevant questions
- Make sure you keep a copy for reference and if you have a referee who will be contacted by the funder – it's a good idea to give them a copy too
- Have the relevant people signed the application form?
- Have you included all requested documents? Constitution, annual accounts, annual report.

What your organisation should have in place when applying for different levels of funding.

There are no set rules and each funder will have their own criteria but this is our guide to what we would advise you to have in place.

What you need to have in place when applying for grants ...			
	under £5k	up to £20k	over £20k
Written terms of reference			
Management committee			
Bank account with two signatories			
Governing document			
Charity or company registration			
Equal opportunity, H&S, Safeguarding policies			
Annual report & annual accounts			
Financial policy			
Business plan			

1.4.8 In addition when applying for grants to cover staff costs the following should also be in place:

- management structures for support and supervision of staff
- job descriptions and person specifications
- a recruitment policy or a clear plan of how you will recruit
- a contract of employment.

1.4.9 Further information and support

One Westminster

The Organisations Support Team can help with fundraising. We may be able to help with the following:

- Identifying possible funders
- Developing your project
- Putting the application together
- Setting up systems to manage the project and finances

Contact us at: support@onewestminster.org.uk

One Westminster
37 Chapel Street
London NW1 5DP
020 7723 1216
www.onewestminster.org.uk

The funder

Some funders offer support and advice themselves, and it is worth taking them up on this if they do. It will usually say so in the application pack or website.

Funding databases

GrantFinder (£££), Funding Central (free), Grantmakers Online (free) are databases of funders nationally. You can put in the details of the type of project you are looking for funding for and it will give a list of potential funders.

Networks

Local networks and forums often exchange funding information or have funders giving presentations.

<http://www.institute-of-fundraising.org.uk/home/>

[Welcome | Trustfunding.org.uk](#)

[Fundraising Standards Board – Home](#)

<http://www.fundingcentral.org.uk>

<http://www.grantsnet.co.uk>

<http://www.theagitator.net/>

<http://www.londoncf.org.uk/lcf/our-newsletter.aspx>

<http://www.esf.gov.uk>

Fundraising books

Tiny Essentials of a Fundraising Strategy

by Maggie Taylor and Ilene Hoyle

The White Lion Press.

The Complete Fundraising Handbook

by Nina Botting Herbst and Michael Norton

Directory of Social Change, June 2012

Writing Better Fundraising Applications (3rd edition)

Mike Eastwood & Michael Norton

Directory of Social Change, June 2010

Just About Managing? Effective management for voluntary organisations and community groups

Sandy Adirondack

London Voluntary Service Council, 1998

Complete Guide to Business & Strategic Planning for Voluntary Organisations (2nd edition)

Alan Lawrie

Directory of Social Change, 2001

Other similarly useful books listed here:

<http://www.sandy-a.co.uk/bookserv.htm>

Useful web sites

One Westminster

www.onewestminster.org.uk

Learn about the work of One Westminster's Organisation Support Team. Also gain access to a range of useful documents through the resource bank 'Online Resources' (located in the 'Organisation Support' section).

Charity Commission

www.charity-commission.gov.uk

Find out how you can register your organisation as a charity, how the charity commission can help enhance your work. View and download publications.

London Voluntary Service Council

www.lvsc.org.uk

Get access to up-to-date information on management and funding, short courses including computer literacy, advice on HR and policy information.

London Councils

www.londoncouncils.gov.uk

A cross-party organisation representing London's 32 borough councils and the City of London. It develops policy and provides London-wide services such as the Freedom Pass.as

Directory of Social Change

www.dsc.org.uk

Get access to resources and literature related to the voluntary sector such as: reference guides, handbooks, CD Rom and e-information voluntary sector training courses conferences, events and briefing days.

National council for voluntary organisations

www.ncvo-vol.org.uk

Get access to information about issues affecting the voluntary sector, access to publications, events and networks.

Westminster City Council

www.westminster.gov.uk

Access local government details, plus archives, local community news, events database and council strategy.

1.5 Directory of Westminster Funders

Edward Harvist Trust

FUNDER	Westminster City Council – Corporate Grants Unit The Corporate Grants Unit VERTEX SW1 Contact Centre Chester Street London SW1X 7DX https://www.westminster.gov.uk/edward-harvist-trust
CONTACT NAME	Carole Headley-Barton
TEL	020 7641 1859
EMAIL	cheadley-barton@westminster.gov.uk
FUND DESCRIPTION	One-off capital items. Preferably this takes the form of items of equipment rather than general contributions towards large capital costs, such as the purchase of building.
GRANT SIZE(S)	The money is distributed in relatively small amounts, with a maximum grant in most cases of £3,000
METHODS OF APPLICATION	To apply please get in contact with the officer (details above) Applications cannot be accepted from individuals or commercial organisations. The City Council will not fund services and activities which are not of direct

1.5 Directory of Westminster Funders

Edward Harvist Trust

benefit to Westminster residents and/or which do not meet the criteria.

KEY CALENDAR DATES

Four closing dates a year as follows:

15th April

31st May

15th July

31st August

Allow up to 3 months for decision regarding award.

Westminster Amalgamated Charity

FUNDER	Westminster Amalgamated Charity School House Drury Lane London WC2B 5SU http://www.w-a-c.org.uk/grants_for_organisations.php
CONTACT NAME	Julia Moorcroft
TEL	020 7395 9460
FUND DESCRIPTION	Revenue (including core cost), Capital Grant, Project costs.
GRANT SIZE(S)	The size of grant varies from £500 to £10,000
METHODS OF APPLICATION	Application form downloadable from their website.
KEY CALENDAR DATES	Trustee Meetings are held on February, May, July, September and November. Trustees' Decision

Strand Parishes Trust

FUNDER	Strand Parishes Trust 169 Strand London WC2R 2LS http://www.strandparishestrust.org.uk/index.php?p=21/35/0
TEL	020 7836 3205
EMAIL	enquiries@strandparishestrust.org.uk
FUND DESCRIPTION	Grants can be used for either capital or revenue costs
GRANT SIZE(S)	Grants of between £2,500 and £5,000
METHODS OF APPLICATION	Application form downloadable from website. Will consider applications to support projects promoting the relief of need and advancement of life of residents of the Borough of Westminster.
KEY CALENDAR DATES	Contact the charity to find out funding rounds and deadlines

Westminster Foundation

FUNDER	Westminster Foundation The Grosvenor Office 70 Grosvenor Street London W1K 3JP http://www.westminsterfoundation.org.uk/
EMAIL	Fill in the online request form http://www.westminsterfoundation.org.uk/contact/
FUND DESCRIPTION	Core costs, Project funding, Capital costs, Resilience building
GRANT SIZE(S)	Small Grants: £5,000 or less (one-off payment). Major Grants: £10,000 - £50,000 per annum often over several years.
METHODS OF APPLICATION	Online application.
KEY CALENDAR DATES	Every 8 Weeks

The Hyde Park Place Estate Charity - Civil Trustees

FUNDER	The Hyde Park Place Estate Charity - Civil Trustees St George's Vestry 2a Mill Street London W1R 9LB http://www.stgeorghanoversquare.org
CONTACT NAME	Shirley Vaughan, clerk to the trustees
TEL	020 7629 0874
EMAIL	hppec@stgeorghanoversquare.org
FUND DESCRIPTION	Grants for general charitable purposes (get in contact to discuss the purpose of your grant request before applying)
METHODS OF APPLICATION	Application in writing to the clerk
KEY CALENDAR DATES	Trustees meet 4 times a year to award the grants. Find the next closing date on the last session of their newsletter downloadable from their website.

John Lyon's Charity

FUNDER	John Lyon's Charity The Grants Office 45 Cadogan Gardens London SW3 2TB http://jlc.london
CONTACT NAME	Erik Mesel
TEL	020 7591 3330
FAX	020 7591 3412
EMAIL	erik@jlc.london
FUND DESCRIPTION	The majority of the grants are awarded as Direct Project Costs to charities working with children and young people up to the age of 25. However, they also consider requests for salary and core costs and buildings and refurbishment in specific circumstances.
GRANT SIZE(S)	Small Grants: £5,000 or less (one-off payment). Main Grants: There is no maximum grant amount (up to 3 years).
METHODS OF APPLICATION	They operate a two stage application process, which is started by a proposal letter.

If this letter is positively assessed, then you will be invited to submit a Stage Two Application Form.

KEY CALENDAR DATES

There are no deadlines for applications made under the Small Grants Fund

Applications for Main Grants are considered by the Trustee three times a year in March, June and November.

1.6 Feedback Form

We welcome your comments on the Funding directory, as well as your ideas for other information you might find useful. Please complete and return the form below or call us if you have any comments or suggestions.

Name

Address

.....

.....

Telephone

Email.....

Comments on the Funding directory

.....

.....

.....

Suggestions for future packs.....

.....

Thank you for completing this form; *please return to:*

Voluntary Action Westminster
37 Chapel Street
London NW1 5DP

1.7 Your Fundraising Notes

