

Guide

Trust applications - a funder's perspective

An interview with **Georgina
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Published 2014

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What should we be thinking about or doing before we go anywhere near a funding form?

Start by thinking about your organisation; can you demonstrate that there is accountable management and good governance in place? Can you demonstrate that the organisation is sustainable and has appropriate financial resources in place? It will be harder for you to get funding if you are carrying forward an unexplained deficit, for example.

Make sure you do your research to be sure you are approaching funders who are right for your project and that you can demonstrate understanding of what they are all about and what they are trying to achieve.

It is important to ensure you don't start work before you've made applications. If you've already started the project there is an implication that you don't need the money and the funder would not have the chance to discuss its shape and embed evaluation within it. You should give some thought to how you will build a relationship with a funder over time but lobbying Trustees is often futile as Trusts like ours will have clear guidelines on how applications are processed and considered.

It's vital you consider your timeline carefully. Have you allowed enough time for a funding decision to be turned around? Many applications fail because they have not allowed enough time between getting a funding decision and implementing the project.

If you are a new organisation or project, consider whether you could link up with an established and respected organisation or individual to provide peer mentoring for your project.

It sounds obvious but make sure you read the guidelines and funding priorities carefully - some applicants don't and therefore end up wasting their time and that of the funder.

What common mistakes are best avoided?

Speaking in jargon and not being clear about exactly what it is you want to do with the grant if you are successful. Get someone who doesn't know the project to read through applications to ensure that they are clear.

If a funder offers telephone calls or email communication pre-application make sure you take up that offer. It can save a lot of time.

Ensure you understand the funder's timescales. Trust and foundation boards usually do not meet every month and therefore decisions can take time. Apply well in advance of needing the money.

What are the key ingredients of a successful application?

Try and be succinct and get to the point of why your project is important and relevant for the funder. You don't have to include everything and remember that supporting material can also be sent - preferably electronically - to back up your bid. If you have a collection of art or heritage artefacts, make the case for why your project is significant and how it is appropriately organised and managed. Give a concise overview of the organisation and the support and partners it currently enjoys, as well as details on how the project will be managed.

Always use photographs, film or audio if you have them as they can often have much more impact than words.

When you are describing the project in detail, ensure it is clear how the funder's support will help and what impact it will have. Be sure to outline who will benefit and what the long term outcomes will be.

Always make sure the numbers match the words. Your budget needs to balance, be clear and breakdown costs so it is clear how you have arrived at your figures. Do illustrate what is already funded and by whom.

If you are able to send appendices too, you should consider including:

- Accounts
- Details of Trustees, Staff and Professional Advisers
- The project in its context
- Business Plans
- Good, clear photographs
- The wider fundraising strategy and the fundraising context
- Clear financial statements and cash flow
- Financial viability of the organisation and the project in the long term

How can you best build a relationship with a funder?

To start with you need to understand what the funder is trying to achieve, then you are much better placed to be able to find ways to work together. You can offer funder visits as well so they have the option to see the organisation for themselves and do invite them to any special events or celebrations of what you have achieved, as they will have played a part in that. You can make sure they know about any training and volunteering opportunities you have to offer as it speaks volumes about you being a learning organisation. Make sure you know what level of monitoring and reporting they require in the evaluation. Give them the

option to contribute to the evaluation and/or ask if there is anything in particular they would like to see measured or monitored. Always take the initiative by following up after the project has finished and ensure you prepare the way for the next application!

How important is the partnership factor?

It depends on the funder and applicants should seek to find this out. Most funders welcome support from other trusts and foundations, private individuals, the community etc. It shows you have a good project and there is confidence in your organisation. Putting together the mosaic of funding is one of the challenges of fundraising and funders are well used to it and expect it.

How important is evidence of impact/track record? What if a new project?

Trusts and foundations are often happy to take a risk on a new organisation, but will look carefully at the governance; trustees' and staff's skills and experience and at the business plan and therefore the financial viability of the organisation.