VENTURE OUTDOORS
Creating Healthy Communities

Community Toolkit to Success
Writing Successful Funding Applications

Toolkit for community groups to outline how to write successful funding applications for outdoor recreation activities and programmes

Introduction

This 'Community Toolkit to Success' has been compiled by Venture Outdoors - Creating Healthy Communities, in partnership with the Northern Ireland Council for Voluntary Action (NICVA). The toolkit was formed in response to a consultation exercise undertaken by the Venture Outdoors team with community leaders, who reported that one of the greatest barriers preventing community groups participating in outdoor recreation activities was being able to secure the necessary funding. Although the Venture Outdoors project focuses on people with disabilities, minority ethnic and those from disadvantaged communities, this interactive toolkit has been designed to help leaders and volunteers from all sections of the community.

This toolkit will give community groups guidance on:
1. Potential sources of funding for participation in outdoor recreation activities
2. How to apply to these sources for funding

Values and Benefits of Outdoor Recreation for All

Outdoor activities provide valuable alternative, often non-competitive, avenues for achievement, as well as opportunities to develop independence and self-reliance. Through successfully facing up to the challenges which outdoor activities provide, overcoming fears and apprehensions along the way, young people and adults make major strides in confidence, with positive implications for all aspects of their development.

Active learning and adventure outdoors can take place in a variety of environments: rural and urban, local and more remote. Outdoor education, training and recreation involve both young people and adults in a wide range of experiences, including adventurous activities on land and water and activities with an environmental focus. Methods used include skills-focused learning, problem solving, team building and self-reliant journeys and activities, with residential experience an especially valued feature.
Reference - **www.englishoutdoorcouncil.org**

"Being involved in outdoor activities has given us the desire and the courage to get out there, to get dirty and wet and just have so much fun!! We are fitter, stronger, more confident and adventurous, and are inspired to do more."
Shane Brunker, Foyle Down Syndrome Trust, Venture Outdoors Community Group Leader.

"Experiencing the outdoors should be a vital part of every person's education both as an adventure and an awareness of the wonders of nature."
Sir Chris Bonington, Mountaineer.

Contents

When you are thinking about applying for funding you need to start a process to:

Plan > Find the Funder > Apply

Through this toolkit you will be shown a clear structure and step by step approach for completing an application form.

It is hoped the toolkit will simplify some of the jargon around making a funding application and will also give some key tips and recommendations to help improve your chances of being successful in your fundraising efforts.

Funding for participating in outdoor activities is available from 3 main sources:

1. Grants-Makers
2. Community Fundraising
3. Trading activity (trading activity is income from selling goods and services and/or delivering public contracts or service level agreements).

It is important to consider raising income from all three areas as it is often difficult to raise all the funds you need from grants alone.

However this toolkit only considers the process of securing funding from grant-making organisations.

There are 3 main types of Grant-Makers:

1. **Grants from Government**
   The government can make funding available through its various departments and agencies. Grants from the National Lottery and the European Union is also considered as funding from government.

2. **Grants from Grant-Making Trusts**
   The main source of funding from grant-making charities is from trusts and foundations often set-up with the purpose of giving grants to other charitable or not-for-profit organisations. Other voluntary clubs and societies can also give grants to community groups eg. the Rotary, Lions Clubs, Masons and Women's Institute.

3. **Grants from Companies**
   Companies may have staff charities, a corporate foundation and an employee giving scheme or a more comprehensive corporate social responsibility policy.

Examples of the 3 main types of grant-makers are illustrated in Table 1, below.

Government	Grant-Making Trusts	Companies
Big Lottery Fund	Garfield Weston Foundation	Lloyds TSB Foundation for Northern Ireland
Local Councils Community Festivals Funds	The Henry Smith Charity	Santander Foundation
European Union	Ulster Garden Villages	NIE - Northern Ireland Electricity

In applying to a Grant-Maker you will normally be asked to follow one of these three processes:

1. **Application Form:**
   Forms that have been developed by the funder, which the applicant must use to apply. Application forms can range from a simple side of A4 paper, to many dozens of pages long.
2. **Letter with questions defined by the funder:**
   Applicants will be asked to answer a set of questions set by the funder in a letter.
3. **Application in writing:**
   Applicants asked to 'apply in writing' generally speaking should send in a letter not more than 2 or 3 sides of an A4 page and should not send in supporting materials, unless specifically requested.

Some Grant-Making Truths

Almost every funding organisation requires the applicant to be either a registered charity, or when it is a not-for-profit organisation, to be at the very least governed by a Constitution document. A Constitution is a set of rules or policies which governs how an organisation can run.

Further information on how to become a charity can be obtained from NICVA's Governance and Charity Advice Team, **www.nicva.org** or from the HM Revenue and Customs **www.hmrc.gov.uk**

A community group should consider asking the advice of a local outdoor activity provider who will have expertise in planning and delivering outdoor activities. They can help with designing an outdoor activity programme so that it is:-

• Realistic and achievable
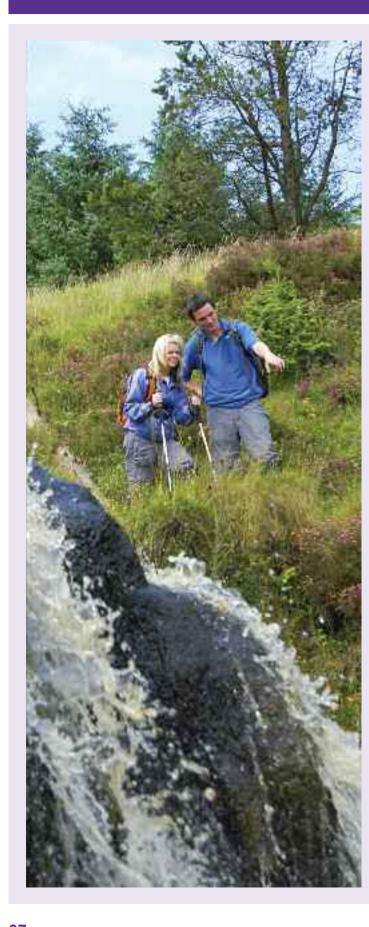• Suitable for the participants
• Within budget

Table 2 - Why Funding Applications Succeed and Fail

Reasons for Success	Reasons for Failure
The application is received by the closing date	It misses the closing date - even by 1 minute
All the supporting documents asked for are enclosed	The form is incomplete or cannot be read easily and required supporting documents have not been included
The funder has enough time before the project is due to commence to consider the application	The project is due to start before the funder can give its decision
There is strong, local, recent and relevant evidence to show that the project is needed	The project is not well planned. There is no clear evidence of need and the objectives, actions and outcomes of the project are not specific enough
The right application is made to the right funder	The organisation is not eligible to apply to the funder
There is something unique, human and inspiring about the application	The application is not well written, uses too much jargon, is too wordy and lacks focus
The organisation applying has a good reputation and track record	Application fails to show the funder that it meets their funding criteria
The applicant is responsive to the funders' requests for more information	The applicant fails to give more information when requested to do so
The project budget is accurate	The applicant fails to ask for an actual amount of funding for real costs. Asks for too much funding, too little or nothing at all

Plan > Find the Funder > Apply

Step 1: Plan your Project
Any successful funding application begins with a good project plan.

Always give your project a name. The more interesting and relevant you can make the project sound, the better.

Be creative. It will help your application stand out above all the other applications the funder will receive.

Any good project plan will include details on the:
- Need for the project
- Outcomes you want to achieve to solve the need identified
- Aims you have set to achieve the outcomes
- Objectives you have made to achieve the aims
- Actions you will carry out to achieve the objectives
- Resources you need to carry out the actions
- Cost associated with delivering the actions
- Indicators which will prove you are achieving the outcomes and tackling the needs

Step 2: Find an Appropriate Funder
Once you have finalised your project plan - this is the time to look for funders to match what you want to do. Tools like NICVA's Grant Tracker **www.grant-tracker.org** will help you find funders interested in the people you want to help, the area of work you are working in and the geographical area where you are based.

For community groups seeking funding for outdoor recreation participation you may find funders interested in recreation and sport, but this will be limited. When you search however for funders interested in health outcomes, working with children and young people, helping people in disadvantaged communities, those with disabilities or from an ethnic minority - the range of potential funders is significant.

If you don't have access to Grant Tracker then you can use funding directories such as:-
- The Directory of Grant-Making Trusts (may be available from your local library)
- Local councils
- Community network organisations

Alternatively, contact NICVA's fundraising advice team **www.grant-tracker.org**

Step 3: APPLY to the Funder
Bringing Your Project and the Funders Together - The Application
When you make an application you are looking to marry your project plan with the criteria of the funder. This will often mean adapting your plan to fit the funder where the funder has more specific criteria. For many funders however - it will be easier to draft applications whenever you have prepared your project plan and you can simply lift content from it into the application.

Understanding the Application Process

To understand the stages involved in the application process it is useful to look at it from the Applicant's side and the Funder's side. This is illustrated from the following chart.

The Applicants Side

Project plan completed, linking with outdoor activity provider if necessary

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Obtain guidelines, application form and deadlines dates

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Thoroughly read guidelines and application form

↓

Contact the funder for more information as necessary

↓

Review your project plan alongside funder's guidelines

↓

Carry out further work to improve the match with funder's guidelines

↓

Complete the application form or write the application letter

↓

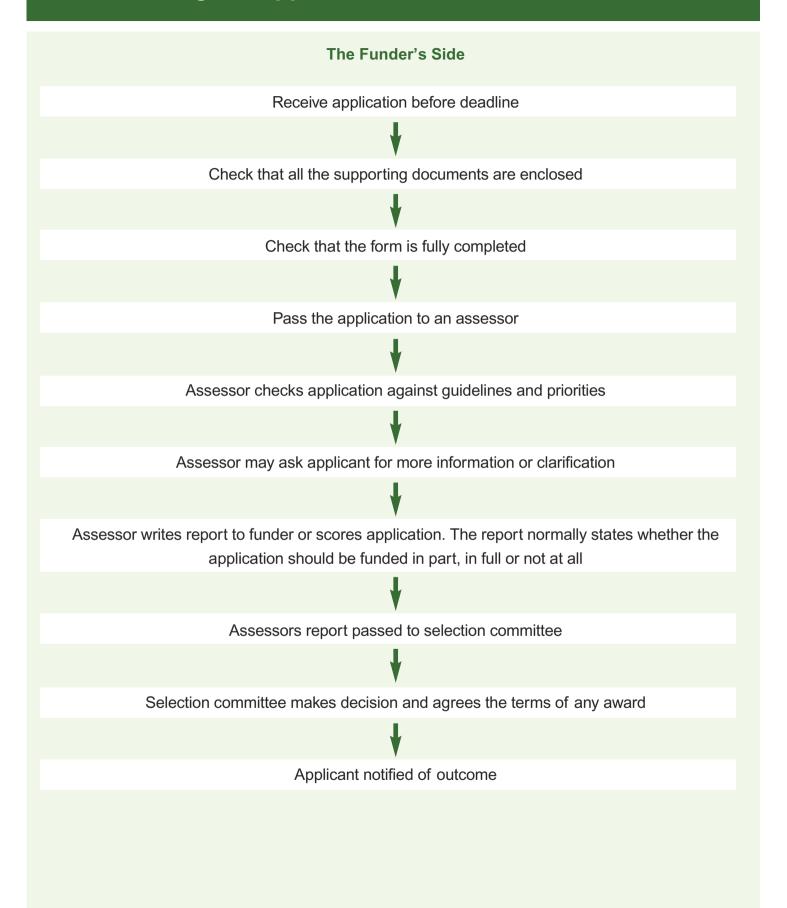Ask someone else to read and review your application

↓

Send the application with all the requested supporting documents prior to the deadline

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Find out when you will receive notification if you are successful or unsuccessful

Understanding the Application Process

The Funder's Side

Receive application before deadline

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Check that all the supporting documents are enclosed

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Check that the form is fully completed

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Pass the application to an assessor

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Assessor checks application against guidelines and priorities

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Assessor may ask applicant for more information or clarification

↓

Assessor writes report to funder or scores application. The report normally states whether the application should be funded in part, in full or not at all

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Assessors report passed to selection committee

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Selection committee makes decision and agrees the terms of any award

↓

Applicant notified of outcome

Before
Before you begin to complete the application form or write the letter, here are some tips:

Put yourself in the funders' shoes
Before you put pen to paper – or finger to keyboard it is important to understand where the funder is coming from. Thoroughly research each funder you are applying to and ask yourself if your project is really something they would normally fund.

Check and confirm eligibility
Make sure you are not wasting your time. If you suspect that you are ineligible, contact the funder first rather than spending time on an application that is never going to get past the first post.

Choose the appropriate writing style
Funders are used to receiving applications for funding that are to the point, persuasive and factual, as this is the best way to convince a funder rather than a begging letter or a rambling hard luck story.
A balance has to be found between including too much information and not giving enough. Aim for concise and clear statements.

Prepare your project's reference material
Have to hand all the information about your project you will need to complete the form. Some of the documents you may need are the governing document; annual report and accounts; project plan; community audit etc.

Check forms and guidelines
Make sure you have all the funder's latest policies, guidelines and application forms relating to the scheme you are applying to.

Recruit helpers
Don't complete the form on your own unless you have to. Get a colleague to assist or delegate tasks to volunteers and committee members.

Schedule time
Set aside time when you cannot be interrupted and when you can focus your attention on making the application. Don't feel you have to complete the whole form in one session.

Assess the form
Assess the form, question by question, to see what information the funder is looking for. If you have any doubt about what is required, phone or email them (if permitted). Check to see if the guidelines give help on filling in the form.

Completing The Application Form
When completing the application form you must:
- Think from the perspective of the funder
- Think about how you will adapt your proposal to fit each funder's specific themes and priorities
- Emphasise where possible that the funder's priorities are your priorities
- Show how your application will meet their funding objectives and policies
- Ensure that the funder's target beneficiaries are your beneficiaries - and that the funder's ethos matches your ethos
- Make sure you are giving the right answer in the right place
- Be sure that when you take an answer from your project plan that it is really the right content for that part of the form
- Re-word the answer if you need to, but always be true to your own aims and objectives

The importance of reading the questions cannot be overstated.
You may find using headings and titles which are the same as the funder's will mean the grant assessor can clearly see that your application fits - and that you really have read their guidelines.

What the Funder Wants to Know

Contact Details

This may seem like a simple area of the form to complete but make sure you put in the name of the person who can competently answer any follow up questions from the funders on the project. Provide a mobile number if possible.

Background of the Organisation

Try to write a concise and powerful statement of why and how the organisation was set up and how that is reflected in its current mission. Other areas to cover include how it is run; what geographical area it covers; what ethos it is based on and; what support it has within the community. Also highlight your key achievements and some of your greatest successes.

Organisational Aims and Objectives

Be sure that you are answering the right question here. This question normally refers to the aims and objectives of your organisation - not the project you are applying for. Be careful not to confuse these. When writing aims and objectives you probably want to separate these out and talk first about the aims and then the objectives. Avoid long general statements that don't really say a lot.

Example Organisational Aim:

Our aim is to improve the lives of young people in North Belfast who are at risk of developing serious mental health issues.

Example Organisational Objective:

Objective 1: Our organisation will provide a diverse range of outdoors activities over a 12 week programme for 100 young people to increase their confidence and self esteem, encouraging them to feel safe, and be open about their issues and problems.

A good objective follows the **SMART** Acronym.

S: Specific   **M:** Measurable   **A:** Achievable   **R:** Realistic   **T:** Timebound

What Do You Want the Grant For?

This is where you summarise who the project will help - how it will help them - what you will do - and what you need to make it happen.

Since this is a 'summary' of the entire project, sometimes it is easier to answer this question at the very end.

How Do you Know the Project is Needed?

This is the most important question on the application form.

You must demonstrate, convince and persuade that there is a real need for your project. You will have to prove as much as possible that the needs are not being met by anyone else and that your organisation is best placed to tackle the issue.

If the evidence doesn't already exist you may need to undertake some work as a community group for example undertake an audit or survey or carry out some larger scale research.

Some sources of evidence
- Use relevant research from government and other recognised sources
- Use relevant local information from the census via Northern Ireland Statistics and Research Agency (NISRA) **www.nisra.gov.uk**
- Conduct local community audits and/or audits of service provision to show your project proposal fits a gap in the area
- Seek other professional's opinions and the support/endorsement of other organisations

Table 3- Methods of Collecting Evidence

Reading	Recording
Progress reports Minutes Diaries Correspondence comments	Numbers, ages Genders from geographical source
Observing	**Questioning**
Activities, events Photographs Meetings	Questionnaires Formal/ informal interviews Individual groups, talks

In summary, let the funder know you have done your homework. You may want to write a report of all the evidence you have collected but give the funder only the key findings in your application.

Project Aims and Objectives

These ought to be different from the organisational aims and objectives but you will want to make sure these reflect the funder's aims and objectives for its grants. As said elsewhere - it is recommended to use the same words as the funder when linking to the themes and priorities of the funding programme here.

Again any project objectives should be **SMART**.

A good project objective would be:
To provide 10 x 2 hour sessions of hill-walking activity in the Mournes between September and December this year for 24 young people aged 13-16.

A poor project objective would be:
To bring a group of the area's young people out hill-walking in the Mournes.

How will you Deliver the Project
This is where you can set out your project actions as you developed them in the project plan. You should have specific areas of work, or even a more detailed work plan about what you will actually do over the year.

How Will you Monitor and Evaluate the Project?

If you have properly planned your proposal from the start you should have built in monitoring and evaluation processes. This is where your **SMART** objectives become **SMARTER**.

E: Evaluated   **R:** Reviewed

Examples of how to monitor include evaluation forms and one to one interviews. This information should link directly to the key outcome performance indicators you have set for the project. Monitoring and evaluation will not only measure how well you are doing, but also help you to be more effective. It is a key part of every project. It is needed to:

- Assist with planning
- Report back to funders or users
- Secure further funding
- Improve the work you are doing
- Learn from your mistakes or successes

How Will you Monitor and Evaluate the Project?

There are numerous ways of evaluating a project depending on the type of project and what the funders may want to know.

Information collected for monitoring and evaluating is generally either qualitative or quantative:
- Qualitative data - opinions, views of participants
- Quantative data - numbers, dates, times

Table 4 - Examples of Types of Monitoring and Evaluation Forms

Visual	Written
DVD's	Evaluation forms
Pictures	One to one interviews
Published materials	Case studies
Art pieces	Focus groups
Shows/festivals	Questionnaires
	Statistics
	Accreditation
	Records of attendance
	Meetings

You might also want to include a cost within your budget to pay for an independent evaluation of your project carried out by an outside organisation.

An excellent guide on how to monitor outcomes is provided by the Big Lottery **www.biglearningzone.org.uk**

How to Budget?

You should provide a fully itemised budget for your project including all the relevant and appropriate costs you need to make the project happen. This will be the total money you need for the whole project. You can then state how much you are asking the funder for and how you are making up the total. The funder may not initially want the full budget breakdown but the main headings of expenditure instead. Always have the full itemised budget on hand to answer queries from the funder.

Table 5 - Sample Budget Layout

Item Expenditure	Cost
Outdoor Recreation programme plan	
Leader Hire Eg. x sessions x hours x rate per hour x number of leaders	
Transport	
Equipment	
Room/Space/Venue hire	
Health and Safety equipment	
Marketing and Promotion	
Total	
Total income from other sources of funding	
Total amount required from funder	

How to Budget?

Budget Truths

Always let funders know what other bodies you have applied to or have received support from. Getting your first letter of support is usually the most difficult stage. Other funders will not be put off by the fact that somebody else is already supporting you. In fact they will be reassured and often will be more likely to follow suit.

It is often transparent to a funder that an organisation is overestimating costs or is too ambitious in its expectations. Only apply for funding for the work you have the capacity to do. Only apply for the actual costs of the project. Don't assume that if you need £10,000, you need to ask for £15,000 because the funder will never give you the amount you ask for. If you present a realistic budget and can account for your figures, there is no reason to believe a responsible funder will not award the full amount, subject to their grant conditions.

How Are You Going to Sustain the Project?

Funders may also ask you what is going to happen at the end of the project or at the end of the funding period. You really only have two options:

1. **The project will finish at the end of the grant period**
2. **The project will secure funding from other sources**

For option 2 it is recommended that you include expected sources of other revenue. This may be through specific trusts, corporate or lottery funding. It may also be through income generation which builds through the life of the project. Very rarely will any project be sustained by being 'mainstreamed' into government expenditure. This is an unrealistic expectation and funders will not believe it unless you are a long way down the line of negotiation with government funders and have the paperwork to prove it.

The best approach is to develop a fundraising strategy. A fundraising strategy should show how you plan to realistically access the diverse range of fundraising options including Grant-Makers, Community Fundraising and Trading Activity.

Further Information and Contacts

NICVA, 61 Duncairn Gardens, Belfast, BT15 2GB. Tel: 028 9087 7777
www.nicva.org
www.fundraisingni.org
www.grant-tracker.org
www.facebook.com/GrantTracker
www.communityni.org

Directory of Social Change (DSC)
Directory of Grant-Makers
www.dsc.org.uk

Department of Social Development Northern Ireland
www.dsdni.gov.uk/funding_programmes

Northern Ireland Direct Government
www.nidirect.gov.uk

Northern Ireland Statistics and Research Agency (NISRA)
www.nisra.gov.uk

Venture Outdoors send information to community groups on our database on funding opportunities.
Contact: Claire Overend, Venture Outdoors, Development Officer,
Countryside Access and Activities Network Email: c.overend@countrysiderecreation.com

Some Top Funders

Big Lottery Fund: Awards for All - **www.awardsforall.org.uk**

Lloyds TSB Foundation NI - **www.lloydstsbfoundationni.org**

Community Foundation for Northern Ireland - **www.communityfoundationni.org**

Sport NI - **www.sportni.net**

BBC Children in Need - **www.bbc.co.uk/pudsey**

Garfield Weston Foundation - **www.garfieldweston.org**

Henry Smith Charity - **www.henrysmithcharity.org.uk**

Your Local Council for Sport, Community and Festivals Funding

Esmee Fairbairn Foundation - **www.esmeefairbairn.org.uk**

Sport Relief / Comic Relief - **www.sportrelief.com/www.comicrelief.com**

For more information contact the Venture Outdoors - Creating Healthy Communities team:

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This guide is available on request in alternative formats