

Developing a Funding Strategy

CFNF & Fourways Partnership Funding Fair - November 2010

Documents available at

<http://www.fourwayspartnership.org.uk/funding-information-support/>

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Understanding and clarifying your project

- Stakeholders and funders expect clear statements about the reason for the project's existence and what it is doing. This clarity is also needed to plan the project work and to monitor and evaluate it. These statements can be expressed in the following way:
 - **mission or overall aim** – broad statement of what your organisation wishes to achieve
 - **specific aims** – the changes or benefits you are trying to achieve
 - **objectives** – statements about how you will pursue your aims – what actions you will take to achieve change
 - **vision, values and beliefs** – the vision and moral principles which underpin your work
- If these statements were not clearly developed when the project was first set up, it will be helpful to do this as a first step in monitoring and evaluating the project.

Vision, values and beliefs

- **Vision** - what sort of world you would create for your beneficiaries if you were handed a magic wand? Example ... *“Our vision is a society in which all children are loved, valued and able to fulfill their potential. In other words, a society that will not tolerate child abuse - whether sexual, physical, emotional, or neglect.”* (NSPCC)
- **Values** - reflect the organisation’s core ideology – they are the principles, standards and qualities that characterise the way in which a charity conducts its work. Example ... *“Greenpeace does not solicit or accept funding from governments, corporations or political parties. Greenpeace neither seeks nor accepts donations which could compromise its independence, aims, objectives or integrity. Greenpeace relies on the voluntary donations of individual supporters, and on grant-support from foundations.”*
- **Beliefs** - are a statement of what the organisation believes or accepts to be true. Example ... *“We believe that through adventure, we challenge individuals so that they learn and experience new things that can enrich their lives.”* (The Scout Association)

Mission or overall aim

Your mission or overall aim should be short and sweet – a ‘sound bite’ that enables people to immediately understand what you are about.

Examples

- *“WaterAid is an international NGO dedicated exclusively to the provision of safe domestic water, sanitation and hygiene education to the world’s poorest people.” (WaterAid)*
- *“To provide information, practical assistance and emotional support for anyone affected by breast cancer.” (Breast Cancer Care)*
- *“To encourage a better understanding of autism and to pioneer specialist services for people with autism and those who care for them.” (National Autistic Society)*

Some organisations choose a strap line which may be the mission itself (e.g. RNLI) or give a ‘sense’ of the organisation (e.g. WWF) perhaps supplementing a fairly non-descript or abbreviated name

Examples

- *‘Working to protect human rights worldwide’ (Amnesty International)*
- *‘For all the world’s children – Health, education, equality, protection’ (Unicef-UK)*
- *‘Saves lives at Sea’ (RNLI)*
- *‘For a living Planet’ (WWF)*

Specific aims and objectives

Specific aims are statements about aspects of your mission – they allow you to describe more specifically what you want to achieve.

Aims and objectives are linked in the following way:

Aims are the *changes* you are trying to achieve.

Objectives are the *methods* or the *activities* by which you achieve your aims.

Try not to have too many aims and objectives and don't make them vague or too ambitious.

Aims

Aims will usually describe:

The people the service or activity is intended for.

The intended benefits, or changes you expect to make, for your target group.

Aims may also identify the geographical area in which the project will work. Although they should be clear, aims do not specify exact details of what will be done to achieve them, nor do they spell out a timescale.

Examples of specific aims

“The Blue Cross exists to:

- treat the animals of owners who cannot afford private veterinary services;*
- find permanent homes for unwanted or abandoned animals;*
- educate the public in responsible animal ownership;*
- promote the benefits to humans of companion animal ownership;*
- ensure that all engaged with us, whether animals or people, receive courteous, friendly and high quality service.”*

“Action for Blind People enables blind and partially sighted people to transform their lives through:

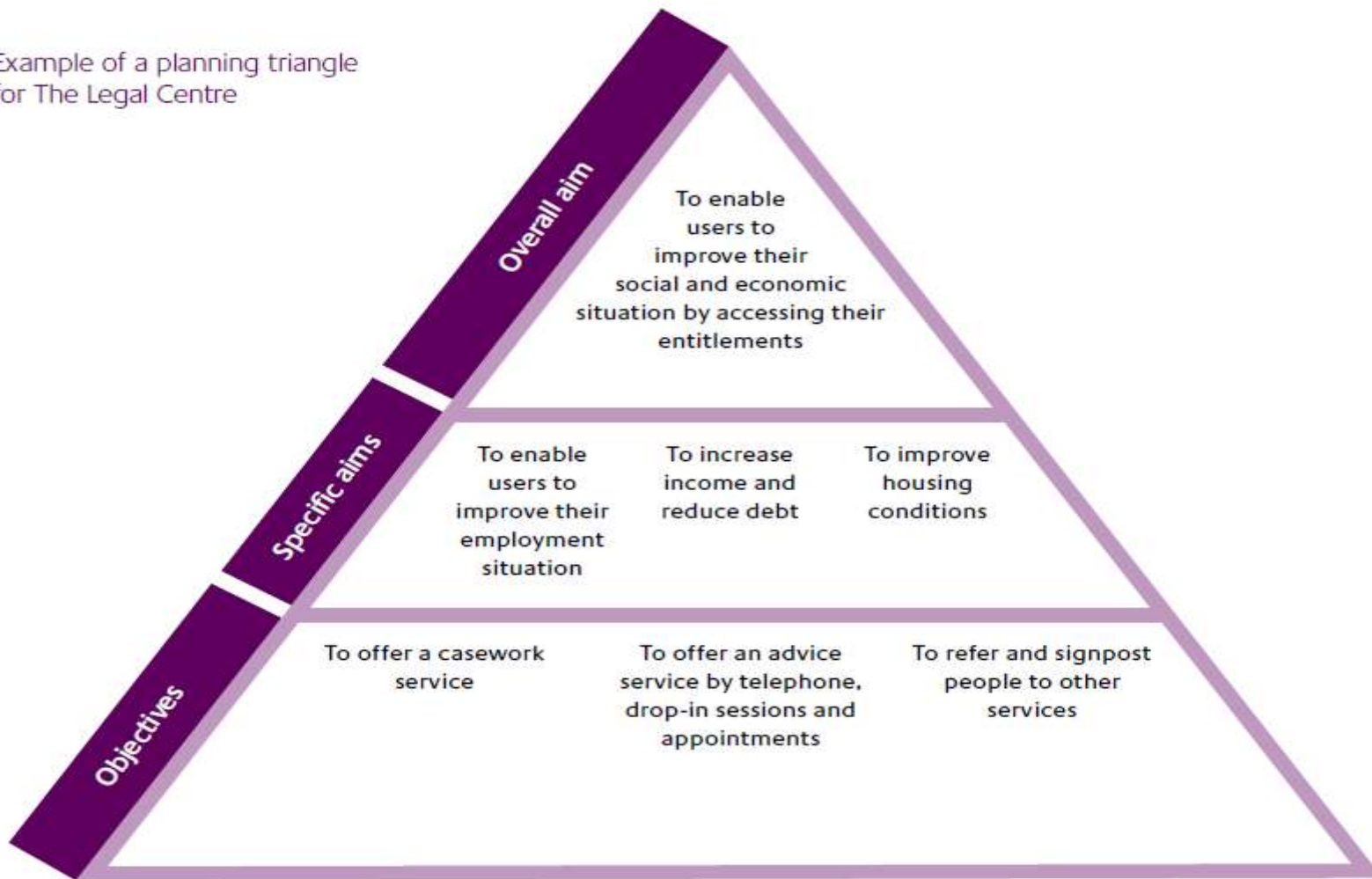
- o Work: this includes services for visually impaired people to look for work, return to work, retain their job or set up their own business.*
- o Housing: Action for Blind People provides an innovative housing service called “Your Choice” that works with visually impaired people to enable them to live independently.*
- o Leisure: whether it’s a holiday break or a passion for sports, Action for Blind People has a range of services for visually impaired people.*
- o Support: able to address all questions around sight loss, Action for Blind People provides a National Information and Advice Service that can also provide specialist advice on the Welfare Benefits available to visually impaired people.”*

Objectives

Objectives identify what the organisation will do and the services it will provide. Each aim will have one or more objective, and some objectives may relate to more than one aim.

You can do the same thing with internal or organisational aims and objectives. These are mainly concerned with helping the project achieve its external objectives. They relate, for example, to management, finance and personnel.

Example of a planning triangle for The Legal Centre



Organisation	Anytown Alcohol Recovery Project		
Mission/overall aims	To help those who are recovering from alcohol dependency		
Specific aims	To promote good mental health amongst people recovering from alcohol dependency in our project area	To promote good physical health amongst people recovering from alcohol dependency in our project area	To ensure that in our project area people recovering from alcohol dependency have access to support networks
Objectives Prioritise: MN – Maintain current activity S – Short term M – Medium term L - Long term	<p>MN – Provide hostel for 30 people in Anytown</p> <p>S - Provide newsletter for service users and Practitioners – initially twice per year</p> <p>S - Provide a programme of weekly social opportunities in supportive alcohol free environments</p> <p>S – Set up a ‘buddy’ system to support people recovering from alcohol dependency in accessing our provision or to access ‘mainstream’ opportunities e.g. adult education, health and leisure classes</p> <p>S - Provide volunteering/community opportunities for people recovering from alcohol dependency</p> <p>S - Produce a self help pack for our service users</p> <p>M - Provide a programme of weekly activity/keeping healthy sessions</p> <p>M – Provide a programme of informal learning opportunities</p> <p>M - Provide a website for service users and Practitioners</p> <p>L - Provide a drop-in counselling service</p> <p>L - Provide a telephone helpline</p> <p>L - Provide a home support service</p>		
Vision/ Values/Beliefs	Our vision is for world where lives are not damaged by alcohol dependency.	Our services should be responsive, professional and caring.	We believe that all individuals have the right to be treated with respect and dignity and promote a culture of mutual and self respect.

Pulling everything together – a Funding Strategy work plan

Where are we are now?

Most of this information is on the 1 page table on the previous slide. You will also need to have current management and financial information ready to support bids – perhaps your last annual report and constitution.

Where do we want to be?

These are the objectives you identified on the 1 page table on the previous slide.

What financial resources do we need to make this happen?

Break the project/s down into the items you need to fund and identify how much funding you need. You will need this for funding bids.

For example:

We need to raise funds to cover the purchase of equipment for the project – £25,000

We need to raise funds to cover the cost of completing the work - £10,000

We need to raise funds to recruit and train volunteers to help with fundraising collections and activities - £1000

We need funds to cover day to day running costs of the project – admin. stationery, printing, telephone/IT, out of pocket expenses for trustees and volunteers - £500

Pulling everything together – a Funding Strategy work plan

How are we going to generate these financial resources?

Identify your potential sources of funding

For example:

Fundraising events: Local show, Coffee morning

Donations: Local companies, collections

Funders: BIG Lottery, Local Authority, Grant Making Trusts National Park etc.

Set targets for how much you hope to generate and when – think about what practical steps would be involved

For example:

Grant Making Trusts – target £25,000 in 8 months

Research a wide range of UK funders and consider which would be most likely to fund our project.

Identify their deadlines, funding cycles etc.

Record which funders we will apply to for the project, who will do it and when.

Draft a generic ‘case for support’ – this may need adjustment to fit funders documents but it will be useful to have the key elements clearly defined.

Keep a record of all applications – if you are successful you also need to keep track of the feedback/reporting requirements.

Collections – target £2,000 in 6 months

Local shops and businesses will be approached and collection boxes placed in them.

We will use our fundraising volunteers to make collections outside supermarkets and operate street collections.

Pulling everything together – a Funding Strategy work plan

What other resources do we need?

You may also have need to develop your organisation to support your new project.

For example:

We need to recruit a further trustee to oversee/co-ordinate volunteers operating street collections.

Timetable & Action plan

Once you have assembled the information above it needs to be formatted into a simple action plan showing what needs to be done when, in what order and by whom. Think about risks and how plans could be adapted if necessary – e.g. Can your project be scaled down and still make an impact?

Alsosaying THANK YOU to your supporters and funders is always a good idea and don't forget the S word.

Sustainability is about much more than simply obtaining money. Sustainability requires effective forward planning and robust financial management together with an understanding of what funding and income opportunities are available and a willingness to diversify into these where possible. It also involves building organisational skills and capacity to ensure the best and most effective use of resources.

Other sources of information

- For guidance on project design and using an outcomes based approach see <http://www.ces-vol.org.uk/downloads/yourprojectanditsoutcomes-139-146.pdf> and http://www.biglotteryfund.org.uk/er_eval_explaining_the_difference.pdf
- Introducing Funding and Finance - A pocket-sized guide designed to introduce voluntary and community organisations (VCOs) to the range of available funding and financing options. The resources aim to provide VCOs with practical information, support and guidance to help them in their search for long-term financial sustainability.
free download at www.financehub.org.uk or
NCVO's Sustainable Funding Project website at www.ncvo-vol.org.uk/sfp/Introductory-Pack
- Your local extended services coordinator can also be a source of help with funding queries, or point you in the right direction! Contact details on the front sheet