

Top 10 tips

for making a better ask

Making a better ask, or 'case for support', is essential for any organisation seeking funding. It is both the cornerstone of any fundraising campaign and can help promote your best achievements.

We manage a wide range of programmes for our private clients, UK Trusts and Foundations and a variety of community endowment funds that invest in strengthening communities.

Our grants recognise the inspirational role of community groups, projects and charities in identifying and addressing local needs. We also award educational grants and scholarships.

Take a look at these top hints and tips, before starting your application:

- 1.** Each programme will have its own **unique criteria** that will explain the aims of the Fund, who can apply and what you can apply for. Please read and digest this information. Make sure you are only applying to fund a project that you/your organisation can realistically deliver.
- 2. Ensure good governance.** We look at the organisation just as much as the project. Governing documents hold the core information about your organisation and should be working documents – a document where the contents are put into action - not a document kept on a shelf and never looked at. Accounts and/or Income & Expenditure sheets are a key insight into the health of your organisation. A grant will not be awarded if the organisation poses a risk through poor management and/or poor financial procedures. Ensure these supporting documents are in order and **ALWAYS** include them with your application by the given deadline.
- 3. Unrestricted Reserves** (sometimes called 'Free Reserves') mean free reserves that are not tied to a particular use. It is recommended good practise to have a set limit of between 6-9 months operating costs in unrestricted reserves, and to have a policy regarding this. To have no unrestricted reserves could raise concerns that the organisation is unlikely to survive the short term and that the project is unviable. We need to understand that your Trustees are aware of this risk and are taking steps to increase reserve levels in the long term.

High unrestricted reserves could indicate that your organisation is in a healthy position with lots of money in the bank. It would appear therefore as though your organisation does not need a grant. You should explain if high reserves are the result of savings put aside for a specific purpose - to purchase premises for example. Be honest about this figure within the application form as this can be checked within your annual accounts.
- 4.** We want to see that you **know your community** well and understand the issues it is facing. Tell us about these issues and how they affect the people you work with. Try not to use generic statistics, local information that relates to your area is more realistic, but ensure it applies to the people you work with. Ensure your application is factual; don't exaggerate your claim but also don't underestimate the value you bring to a community.

5. Write your application in **clear English or Welsh**, avoiding the use of jargon and of acronyms. Do not assume that we will know what you mean – explain everything concisely.
6. **Ensure that your figures add up.** Providing us with a cost breakdown helps us to see that the project you're requesting funding for has been planned and all costs have been taken into consideration. If you are applying for part funding, let us know which specific costs you want the grant funding to cover, and where/how you intend to cover the remaining costs. If this includes other grant applications, tell us where you've applied and when you expect to receive an outcome.
7. Think about **why your project is needed**, and how you know this. Explain the process you have gone through to find this information. Include any community consultation, any relevant local information and project monitoring where work is ongoing. This shows us that you have taken the views of your beneficiaries and used that information to shape the project you are proposing. Be passionate about your work, tell us why your organisation is special and explain why your beneficiaries think you are special.
8. **How will you know your project has been successful**, and how will you measure this? Remember to tell us in your application. For example:
 - Increased membership from X to Y over 12 months.
 - Formal feedback via two questionnaires at the beginning and end of the project.
 - Video clips showing reflections by beneficiaries.
 - Feedback from a third party such as teachers, neighbours or parents.
9. Please tell us as clearly as possible **what you would like to spend the funding on**. This should include as much detail as possible.
10. Finally, **ask someone who doesn't know the project or your organisation to read the application** before you submit it - if they can understand what you are proposing, that is a good sign that we will too.

Good luck!