

Writing a Grant Application in 10 Steps

1. What do you want to do?

Have a clear idea of your project.

If you don't have a clear idea of what you want to achieve and how you want to do it then how can you tell anyone else about it in a way that will make them want to support it.

Make sure everyone agrees what the project is and what it will do.

Everyone involved in the application needs to be in agreement about it so ask everyone involved for their ideas and suggestions. Don't go away and write it on your own and then present it to your colleagues, they will have not have the same sense of ownership, understanding or commitment to the project.

Does your Constitution allow it?

Does the project meet your Aims and Objectives?

Don't miss this essential step, apparently many funding bids are submitted without anyone noticing that over the years the organisation has drifted away from its original purpose. Most funders will ask for a copy of your constitution or will check your Charity Commission page, and area of benefit will be the first thing they will check. Get this wrong and no matter how well written your bid is it will be rejected. If you need to change your governing documents then allow enough time for this.

Have a realistic timescale.

Don't underestimate the time it can take to put a bid together. If you are submitting a big application it takes time to get the budget right, work out partner support, in-kind contributions.

2. Research the Funders

There are lots of funders out there and all have their own areas of interest and criteria for giving funds to particular projects and organisations. Some of these have lots of information and guidelines to help you with your application (and from their perspective this hopefully reduces the number of bids they have to look at that are outside their remit!) but others remain a mystery – they don't publish any guidelines and their decisions may be made according to personal interests and according to criteria that you aren't aware of.

So don't just apply to the first organisation that someone suggests or has a looming deadline that you think you should meet. Do some research. There is a list of places to begin in the attached 'Funding Sources for Heritage Grants' document - Funding Central (www.fundingcentral.org.uk) is a good one to start with.

If you can't find out much about a Trust or Foundation then look them up on the Charity Commission website where you can always find out some basic information about them. Unless they are very small they also have to send their annual accounts and reports to the CC and these are uploaded as PDF files onto their CC pages. Have a look at them, some will include information about who they have funded previously and give an indication of typical grant amounts. Some won't but you can at least get an idea of the amounts of money they have to give to charitable causes from the accounts.

Analyse their priorities and timescales and compare them with the project for which you need funding. It may help if you put them in a table and colour code them according to how well they match your needs. I usually put them all into an Excel spreadsheet with a summary of what they fund and the amounts of money they usually give, and I include the ones that aren't a good fit so that I don't waste time looking again later and so I can quickly see if they are suitable for another project. Then I can add a column at the end to say if and when I have applied and another with the outcome.

3. Read the Rules

What do they fund? Are there any exclusions? What are their priorities? How much do they fund? Does it need match funding? Is there a deadline?

WHEN do they pay (some pay all or part in arrears). If they encourage contact, give them a call and discuss your idea.

If you aren't sure if your project meets a charities criteria then give them a call and ask them before you spend a lot of time on making your application.

Read the criteria and exclusions carefully.

Note whether they want to fund a specific element of a project or are happy to make a general contribution towards the total amount, if they want to be approached first or only want to come on board when most of your other funding is in place.

Some charities have a 2-stage process with a fairly 'easy' first stage when you tell them about the project in broad detail. They then decide if it is of interest to them and if it is they will invite you to submit a full application. One example of this is The Clore Foundation.

The Heritage Lottery Fund has an *Expression of Interest* form on their website so you can pitch your idea to them and they will respond with feedback. This isn't compulsory BUT the majority of successful grant applications go to organisations that have done this - skip it at your peril. It's also a way of getting some useful advice that can improve your bid.

Most charitable trusts will probably be rejecting around 9 out of 10 bids that DO meet their published priorities so make sure you are clear about how you meet their priorities bang on – don't make them have to work it out, tell them in plain language. Also many funders have a time limit before you can reapply, often 1 or 2 years, so don't apply unless you can show your project is a good fit with their priorities.

4. What is the NEED? Most bids fail on this!

Why is the project important? Why are you doing it this way? Why now? What will happen if you don't do it?

Getting this wrong is one of the quickest ways to ensure your bid ends up in the waste paper bin and it's the part that many bids fall down on. You have to make your project more enticing, more urgent than the other applications they receive. Find some evidence of the need. Are there any statistics you could use? Does your area have problems that your project will help? Check your County Council website for facts. Have you asked your users? It's not that you **want** something (*we would like a lift so people can get upstairs*), it's a **need** (*we had 35 visitors last year who couldn't get upstairs and 10% of people in the street survey said they wouldn't even visit because they know they can't get upstairs*). You could also use a case study from elsewhere that shows the benefits.

You also need to demonstrate the NEED so you can use that to inform your OUTCOMES.

5. What will get better?

Why should they give you the money? How important is it? What will the project do? What will the OUTCOMES be? They can be measurable (20 children have learnt new skills at our family fun day) or aspirational (vandalism will be reduced). Do the OUTCOMES match the NEEDS?

Example: We wanted to improve the local history display and tell younger people and incomers about their community.

NEEDS: New families and young people are isolated and don't easily fit in. They don't join local societies and clubs. Vandalism is worse than in surrounding areas and has increased in the last five years. In a survey 65% of people couldn't answer 5 simple questions about the area and said they would like to know more.

INPUT	OUTPUT	OUTCOME
We refurbished a case, bought mounts and new display boards. We created a new display with maps and photos. We wrote a leaflet about the museum and the collections of local items we have. We asked people what they thought in a simple survey form.	We had a temporary exhibition in the library and gave a talk at the local school. We gave leaflets to families via the school and playgroup and to new people via the estate agents and social housing trust. We had a family welcome day at the museum.	Fifteen new families visited the museum. The playgroup now makes a monthly visit to the museum and the school is planning to visit annually. 5 incomers have become museum volunteers. 70% of people surveyed said they knew more about their community, had learned new things and had made new friendships in the area because of the project. Vandalism has reduced this year.

What you need to do here is tell the funder what difference your project will make, why will it make the world a better place, what will change by doing it. It should include quantitative and qualitative outcomes.

Generic learning and social outcomes

Generic learning and generic social outcomes are exactly what they say they are – and these can help you to identify some of the more aspirational outcomes your project could achieve. You can see them all here

<http://www.inspiringlearningforall.gov.uk/toolstemplates/genericsocial/index.html>

The HLF sets out its expected outcomes very clearly – have a look at how they compare to these - see the similarities?

6. Can you do it?

Will you be able to complete the project? Have you done this kind of thing before? How robust is your organisation? If your museum is new, show that the people involved have some experience. What is your track record?

Funders need to feel confident that your organisation is robust and that you have the capacity and skills to deliver your project. Make sure you demonstrate this by stating your experience, skills and other projects you have successfully delivered. Mention specific skills of the people who will be involved for example a Trustee who has a good financial background and who will be overseeing the project budget. If you have achieved any external standards such as museum Accreditation or Investors in People make sure you mention them. Succinctly itemise your legal status, mission, founding date, number of trustees etc, say if you have a business plan and list some of your policies.

Give them the evidence to show you can deliver.

7. Tell the story clearly

This should be the easy bit – so why do many applicants get it wrong?

The funder should be able to see easily

- WHY your project is important
- WHAT you are planning to do
- WHO will benefit
- WHEN you will do it
- HOW you will do it
- HOW MUCH it will cost (and where any other money is coming from)
- WHAT it will achieve (outcomes)
- HOW you will check its success (Monitoring)
- HOW you will decide what worked and if you could have done it better (Evaluation)

Think of a catchy title or great opening line – something that sums up what you want to do and that will immediately make the reader want to know more.

Ask people who aren't involved to read it – Is it clear to them? See if they can explain your project back to you after they have read the application.

Is anything missing? Is it exciting? Have you used the funder's priority words? Challenge any assumptions they might be making about your museum/area.

A good project can be sabotaged by a badly written proposal. A funder might think your project is a great idea and is something they would like to fund, but they can't fund it because the application is badly put together and fails to get across how exciting it is and what it will achieve.

The bullet points above are the same that are used for writing press releases – you need to attract attention and include all the important information at the beginning. Engage the decision-maker early on and they will want to find out more. You are competing with other applications – make yours the one that engages the decision-maker right from the start, they are then more likely to look favourably on the rest of your bid.

After you've written an application let someone else who is used to writing edit your text. When you are very closely involved in putting a bid together you need someone with a more objective eye to look at what you have written to make sure it reads well. Also leave it for a day or two and then go back and read it again – you'll immediately see it more objectively yourself and will see where you may have overused a particular word or repeated yourself. When we were writing our HLF North Norfolk Stories bid one person wrote the text and two people edited it –and then after the initial application was written the HLF changed the process so that there was a much-reduced word count for each section! We had to reduce the text by about a half but in the end I think we had a much stronger, more focused bid.

8. Get your numbers right

How much will they fund? How much are you asking for? Does it need match funding? Can your organisation handle this budget? Reassure them about your financial arrangements (Two signatories? An experienced Treasurer? Audited accounts?) Have a look at the cost of the project? Is it reasonable for what you hope to achieve? Is it good value (not the same as cheap)?

You're not trying to make your budget as cheap as possible but you do need to show VALUE FOR MONEY. Not representing sufficient value for money is one of the main reasons that lottery bids fail. Funders will expect you to price the various elements of your project realistically at the going rate. If you don't they may be worried that you are unaware of the true costs and could doubt your project management abilities.

Don't forget to include a share of your ongoing overhead costs. The best way to work this out is to use the FULL COST RECOVERY method – a recognised tool that helps you work out realistic costs for your overheads and also for staff costs. So for example if a member of your staff is going to be allocating one day a week of their time to a particular project you can work out the figure to include in the budget.

The Big Lottery Fund website has more information and a spreadsheet that works out the figures for you www.biglotteryfund.org.uk/fcr and the Funding Central website also has information about it.

9. How will you show what it did?

MONITORING: collecting your original benchmark data and the data after the project has been running for a measurable period.

EVALUATION: the process of thinking about the data, considering its implications and using it to amend aspects of your project.

You need to show that your organisation understands the needs to check and capture what you are doing and that it delivers your original aims.

Evaluation should be informed by your aim and outcomes. Makes sure it's achievable and don't forget to include the costs in your budget. Also make sure it's at a level that is in keeping with your project, the bigger the project the more monitoring and evaluation you need.

10. Check and send

Read it all through again.

- *Have you checked your Constitution, Aims & Objectives?*
- *Have you answered all their questions?*
- *Have you included any additional evidence they ask for?*
- *Have you checked spelling and grammar? (It matters.)*
- ***Have you got their name right?***

This is **really important**. It's easy to miss small errors and mistakes. Ideally get at least one other person to read it too, and ask someone who is good with figures to check the budget.

Check the application against the funders' criteria.

Make sure that if you have said something in the text it is included in the budget – they do check.

Show them you have understood their priorities. Find key phrases within their guidelines and ensure you have used the exact same words within your application. Specifically mention one or more of their priorities at least two or three times. Make it easy for them to recognise how your project fits their priorities – failure to do this is one of the main reasons bids are rejected.

Check the grammar and spelling.

Make sure you have included any supporting information required – and don't include anything if they specifically say they don't want it – it will be ignored and could annoy them!

Make sure you have got their name right.

Make sure the right person signs it – a trustee or the manager – not the fundraising officer.

Check the budget adds up.

Submit or post you bid.

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This document is a combination of my own knowledge and a presentation given by Helen Jaeschke of Exeter Museums, which in turn references the website of Tamara Essex www.tessex.co.uk