

# How to fundraise from Trusts and Foundations

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Successful fundraising is a process which starts by getting your organisation in order and fit for purpose before moving ahead with planning a fundraising strategy.

## Step 1: Check you are ready to fundraise

- Is your constitution/ governing document up to date and does it fit with current activity?
- Are your financial procedures sufficient to manage your planned projects?
- Are your policies and procedures up to date?
- Are you up to date with monitoring and filing returns to the Charity Commission?
- Are your website and social media presence consistent, up to date and a good insight into your work?

## Step 2: Plan ahead

- What activities/work do you want to do over the next two to three years?
- Why is your work needed?
- Do you have any evidence/ research to prove it? (Do your own research/ consultation)
- Who will benefit?
- What will you achieve (impact/outcomes)?
- How does it fit in with your organisations aims and objectives?
- How does it fit in with other work being done locally? (Do you know what other organisations are doing?)
- How will manage the work - what resources/ expertise do you need?
- How will you measure the work?
- Have you thought about possible problems?

**Write up the answers to these questions to begin your plan.**

### Step 3: Budget

- Decide how out how much money you need before starting to fundraise
- Refer to Newcastle CVS Information sheets “Preparing a budget” and “Funding budgets explained”
- Be realistic with your budget and ask yourself ‘how much will it cost to do the work properly?’
- Raise some money yourselves and show this in your budget - this could be through membership fees, subs or raffles. This gives you some funds that you can spend as the trustees decide (unrestricted funding)
- All money given to you by funders must be spent on what was applied for - this is called restricted funding as there are limits on how you can spend it

### Step 4: Decide who will take the lead for fundraising

Use a fundraising sub-committee and manage the process between you.

### Step 5: Networking

- Talk to others about your plans - is anyone else is doing something similar locally?
- You might be able to work together, or work out why what you are doing is different. Funders notice if there seems to be duplication of work in a particular area
- Don't underestimate the effects of raising awareness of your work and building up good relationships with other organisations and key workers in your area
- Relationship building is a key skill in fundraising

### Step 6: Research funders

- Look carefully at each funder's latest guidance and take care to approach those funders who have the right amounts of money to give - if you need less than £5,000, don't go to those who usually give more than £15,000
- Newcastle CVS funding advice can help you research funders and keep up to date with funding information

### Step 7: Make applications

- Look at possible funding sources, and start applying to those whose guidelines you fit most closely and who can fund a reasonable chunk of your work
- Read the guidance carefully and prepare your application in the way they ask
- Keep a copy of every application you send and record the date you sent it
- The main contact person on the application form should be easy to contact and have quick access to it

- Keep a record of any responses
- If you are asked for more information, then respond promptly!
- Newcastle CVS Funding Advice can help you to improve draft applications.

### Step 8: Thanking and informing

- If you are successful, say thank you straight away and keep in contact, eg send your annual report, copies of publicity and invitations to significant events
- Tell funders immediately about any changes in your situation eg success with other funders, loss of a key member of staff
- If your application is unsuccessful, keep a record of it, any correspondence and any feedback. This helps future applications

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