

# Fund raising - Some practical advice



**If your project is to grow, and perhaps become more than just a basic training project, you will need access to other funds to enable you to undertake more ambitious recruitment and training projects or undertake major capital expenditure such as restoration and augmentation.**

## Ongoing funding

Funding is usually classified as ongoing or 'revenue' expenditure and one off or 'capital' expenditure. For ongoing projects you will need to show that your project can become self-financing in the long term. We are used to ringing being a cheap hobby, but outside ringing people are used to paying anything from a few pounds upwards for a training session, whether for young people or adults. The Birmingham ringers, for example, charge each of their pupils at their ringing school £5 per weekly session. External funders are highly unlikely to even consider supporting something which is not sustainable in the long term.

Therefore, if you are considering organising a summer camp for young ringers, or setting up a ringing school, or some other training project, you should first undertake some market research and consider what it would be reasonable to charge your pupils, then look at likely costs and produce a business plan.

Set up costs are easier to raise. If your recruitment and training project is linked to a bell restoration project, you should consider including the recruitment and first two year's training costs within the overall appeal target.

Guilds and Associations can also make grants towards recruitment and training projects. 100 years ago it was relatively common for them to support training, although the more recent emphasis has been towards restoration and augmentation. Nevertheless central or local District/Branch rules and accounts often still have provision to support training. About 20% of all Guilds and Associations are registered as Charities, not just their Bell Restoration Fund, and their charitable objects usually specifically include them donating towards achieving educational objectives.

The Ringing Foundation was also specifically set up to contribute towards 'people' projects, rather than hardware. For example the 'Big Ring Pull' project (See case study) was funded by a grant of £1,000 from the Ringing Foundation, plus matching grants from the Oxford Diocesan Guild, and local contributions.

## External funding

Several years ago, three of us associated with the Docklands Ringing Centre attended a "Charities Road-Show", which was organised by the London Borough of Southwark in conjunction with the Directory of Social Change. The road-show comprised a series of workshops on various aspects of fund-raising and we attended the sessions on 'Applying to Trusts', 'Building New Partnerships for Funding' and 'Fund-Raising Strategy', which were given by Chris Wells, a professional fund-raising consultant and Sir Martin Berthoud of the Wates Foundation, one of the top 100 trusts.

There were also a large number of fund-raising books for sale, and free information on many aspects of fund-raising - we came away with a pile half an inch thick! At lunch-time there was also the opportunity to meet and talk with representatives from about a dozen major trusts and organisations which donate to registered charities. This road-show gave us the confidence to become more ambitious in our fund-raising objectives, and helped raise the necessary funds to deliver major restoration projects at Rotherhithe, Limehouse, Walworth and Camberwell.

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## 1. Set up and register as a charity

It was emphasised that the very first step in carrying through any project is to set up a charity. Very few trusts will even consider making a donation to anything other than a charity. This is not an onerous task and information about this is readily available. You will only be able to set up a charity if:

- It is set up to benefit the public (not you or a company)
- Its aims are all charitable
- You have a group of people willing to be trustees

Once your charity is set up and its annual income is more than £5,000, you must apply to the regulator (the Charities Commission) to become a registered charity. Charitable organisations with annual income less than £5,000 are exempt for registration, but will still need to register with Inland Revenue to take advantage of Gift Aid. The Charity Commission can provide advice on registering your charity but it cannot provide advice on how to set up a charity for the first time.

<http://www.charitycommission.gov.uk/start-up-a-charity/registering-your-charity/>

If your organisation is excepted or exempt from registration you may apply directly to HMRC for recognition as a charity for tax purposes. Applications should be made in writing using form ChA1. If a body is required to register with a charity regulator it must do so before applying to HMRC for recognition as a charity for tax purposes.

[http://www.hmrc.gov.uk/charities/guidance-notes/chapter2/chapter\\_2.htm](http://www.hmrc.gov.uk/charities/guidance-notes/chapter2/chapter_2.htm)

Churches are regarded as charities in their own right, but in order to avoid any confusion it is better to have a separate fund dedicated to your purpose. Sometimes parishes have a separate restoration or development fund. If money is to go direct into PCC accounts or any other fund, it is advisable to ensure that appropriate arrangements are made to separately account for all money donated specifically towards your Ringing Centre or any training project in a 'reserved fund'. Experience has shown that this does not always happen.

## 2. Local support

Both Chris Wells and Sir Martin emphasised that the very next step is to build up local support for your project. From the point of view of a large trust, they will wish to place their money to best effect and any project which cannot demonstrate a substantial level of local support is not likely to be seen as a good investment.

There are many ways of demonstrating local support. For example, one of the early priorities should be to build up a list of patrons. These could be distinguished local people, prominent businessmen, Councillors, the Mayor, MP's, T.V. or radio personalities, the local Bishop; or if you are lucky, prominent national figures with a local connection.

Patrons can assist by writing a few lines to commend the project, to be included in any submission to a charitable trust. By researching the names of the trustees of charitable trusts on the internet and circulating the details amongst the patrons before any applications are sent out, the patrons can also assist if they know any of the trustees personally. This is the way that professional fund-raisers turn a possible donation of £500 into a donation of £5,000.

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Another way of demonstrating local support is to approach local companies for sponsorship. Companies have limited funds for direct charitable donations. However, their marketing budgets are much more substantial. Provided that there is something in it for them, particularly photo and other advertising and publicity opportunities, they are likely to donate.

Yet another way of enlisting local support, particularly the business community, is to talk to the local Lions, Rotary or Business clubs. They may be able to put you directly in touch with local firms who might sponsor your project.

With links with the business community in mind, you could also consider employing a retired professional or business person to work for one or two days a week and act as administrator or fund-raiser on an expenses only basis.

### **3. Contribution from the group itself**

Yet another important aspect of your request for support is being able to show that your group is making its own direct financial contribution. The parish or group of ringers which expects all the money to come from outside will not be looked upon as favourably as the one who puts some of its own money into a project.

This money could come through covenanting, direct giving, wedding fees, peal fees or cash from some other source. Where there is a local band, weekly subscriptions will help and will provide the added benefits of demonstrating and maintaining the commitment of the band.

Fund-raising events are also another good way of demonstrating local support and the commitment of the group itself. However the advice was that fund raising events often take an inordinate amount of effort, yet perhaps raise only a few hundred pounds at a time. There is also the danger of the same few people being involved time and time again.

It was suggested that events are kept to just three or four per year and a separate group is formed to co-ordinate this form of fund-raising. This would leave time free to concentrate on other forms of fund-raising. It was also suggested that it would be realistic to only plan to raise about 5 - 10% of the total cost of any project this way.

Opportunities should also be taken to exploit fund-raising events to the full. For example the ticket price for a typical quiz evening should cover the cost of holding the quiz and the buffet. Prizes should not be the committee's left over Christmas presents. Local stores will invariably help provide some good raffle prizes. For example one major supermarket chain has a policy of giving up to one raffle prize per year to any registered charity.

We had been surprised how many of the local stores gave prizes when we held our quiz evening at Rotherhithe but, at the road-show, Chris Wells gave us another useful tip which could have boosted our income substantially. He suggested that local companies may be prepared to sponsor particular rounds of questions at say £25 per round. Ten rounds of questions sponsored in this way would bring in another £250. With a little imagination, sponsorship could be made attractive to local businesses. For example, Chris suggested approaching the local car accessory shop to sponsor a round of questions on car maintenance!

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## 4. Approaching local trusts

Before approaching the larger trusts, it is important to approach any trusts with a local connection. Whilst the amount of money they may give may sometimes be relatively small, it does again help to demonstrate the level of local commitment. There are a large number of small local trusts, often with the benefit of specific areas or groups of people in mind. Careful research is important, but will pay dividends. The more you can find out about the trust before applying, the better.

Another tip is that those trusts which have donated to a particular parish or project are those most likely to donate again in the future. Sir Martin pointed out that it was very important to make a point of keeping in touch with these trusts to tell them how their money has been used.

Publicity is also important. Especially when applications to larger trusts are contemplated, it helps to obtain plenty of media interest beforehand. Don't assume that this will go un-noticed by the trusts or that the larger trusts are not aware of what bellringing is. We found that Chris Wells himself had rung bells whilst a youngster in Devon!

## 5. The larger trusts

Only when the earlier stages outlined above have been implemented, is it sensible to consider approaching the larger trusts. Details of individual trusts can be found in various places, the publications of the Directory of Social Change being the most comprehensive (see links below). Hard copy publications are usually available in local libraries, but it would be well worth considering buying an up to date copy, or subscribing to an on-line version if serious fund-raising is contemplated. However the Central Council of Church Bellringers already subscribes to 'Funder-Finder' and would be willing to run a search for you (see links below).

Sir Martin emphasised that it was advisable to contact any trust by telephone prior to submitting any application. This should be to establish whether the application will fall within the trust's criteria, and to check that the trust's funds are not already fully committed for the foreseeable future. This can sometimes be the case. Many of the larger trusts publish guidelines for applicants and a copy of these can also be requested. The name of the person to be contacted should also be checked. About 25% of the applications which Sir Martin currently receives are addressed to his predecessor. He also regularly receives applications addressed to his predecessor's predecessor !!!!

The telephone call can also lead on to a more general discussion on how best to present the application to the trust. Sir Martin went on to explain that he himself had authority to make grants up to £500. Over this amount the chairman of the trustees would need to be consulted, and over £5,000 the trustees as a whole would be consulted, and a personal visit would usually be made.

Written submissions should be brief. At most they should be no more than two sides of A4 and typewritten. If the trust requires more information it can ask for it. The written submission should provide all the information requested by any guidelines for applicants, with attachments if appropriate.

Sir Martin and his colleagues can smell out a round-robin letter at 50 yards. Separate applications should be made to each trust and each application should be written with the objectives of that particular trust in mind. Spelling, grammar and presentation are all important, if your application is to get past the initial hurdle.

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The application should clearly spell out what you are looking for. It is a good idea to ask for a specific sum, perhaps giving a range of three or four options. It is also a good idea to explain which other trusts have been approached and to give details of any donations received. The larger trusts will be looking to see what other support your project has. If the smaller trusts have already given, this will enhance your chances of support from the larger trusts.

Sir Martin also explained that the application will usually be summarised by the trust administrator when it is submitted to the trustees. It would help if you could do this for him. A five line summary in the opening or closing paragraph of your letter could be copied directly into the trustee's agenda.

To accompany your application, it would help if you could give some people as referees. For example, your patrons, or someone else who has direct knowledge of, or benefited from, your work. Alternatively, a case study of how a similar project has benefited another nearby parish may add weight to your case.

A "follow-up" phone call can also be made a few weeks after the application has been sent, to ensure that it has been received, and that no further information is required.

## Did we learn anything ?

The road-show workshops cost £3 per person for each 2½ hour session. We certainly benefited and it helped to be able to talk to a professional fund-raiser and to meet people from major national trusts face to face. Other road-shows and fund-raising training events are held at various venues from time to time. Further details from the Directory of Social Change

## A Word of Caution

When the bells at St. James, Bermondsey were restored in 1990, over £16,000 was raised directly from charitable trusts. Looking back through the files we were heartened to find that many of the points highlighted at the seminar had been applied by those who had raised the money, and we could see how this had resulted in the successful outcome.

Now that we are in the age of the computer, it is very easy to make many applications. However, the use of the internet to identify and charities and send out large numbers of applications will not be the key to unlocking the vast amount of money that charitable trusts have to give away. It will be the quality of each individual application that will count.

Your application will be just one of many and if what is outlined above sounds like hard work or over ambitious, remember that without a well thought through application, any work you put in is likely to be wasted.

## Tips for successful fundraising

There are many fundraising consultants out there charging £1,000 a day, but what they actually do is actually painfully obvious and can be set out as six basic rules. Most of us who have to undertake fundraising tend to drift into it as a role and tend to do it rather reluctantly.

The six basic rules are:

- 1 Time (balance)** - on average proper time spent on grant applications returns a ratio of 1:4 on every pound you invest. And you should therefore recognise this as proper earned income. Allow proper time and space around funding to do the job rather than fit it in between your other priorities - it is genuine work.
- 2 Energy** - people are attracted to people and ideas that are energetic and appear to enjoy what they are doing. Be positive, it works! Remember people fund what they want to fund, not what they ought to fund. So spread the joy and they will be more enthusiastic about being involved.
- 3 Structure** - what is the structure of your organisation or project? What do you do? Are these two answers simple and very clear so anyone can understand them? If not, make them.
- 4 Strategy** - the text books all say that you have to have a fund-raising strategy, but what you really need is a route map to get you from A to Z. How will you do it?
- 5 Persistence** - persistence, persistence, persistence. Ask for feedback when you don't succeed, get a reputation for following up applications, be polite and push – if funders know that you'll be on the phone asking why you've been rejected then they're more likely to say yes in the first place.
- 6 Relationships** - all charitable foundations talk to each other about YOU, who is good to work with and who is not. So how do you form a good relationship? This is through staying in touch.

### Communication

The lazy and easily ignored way of communication is by email, so be personal, send hand-written notes or actually phone people, target a specific person. Remember criteria are there to reduce the administrative cost of the fund, therefore research and follow the criteria. Remember this is a grant strategy – you will probably be reapplying to the same fund so engage with them at every opportunity.

E-mails are a strange combination of formal and informal, but they are not personal and personal works... Invite them along to your events or special days. Always make sure the invitation is for two people so they can bring someone. Make sure you look after that second person just as well as the main person as they will be travelling back with them and talking!

Follow up any contacts **within 10 days** if two weekends have passed you have been forgotten.

Engage with people - Stuff happens!

If you get that grant **don't stop there** it is an on-going process, keep talking to people.

If you get a grant write them a thank you letter – it's surprising how many people don't.

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Make sure you complete all the stipulations of the grant such as evaluations or reports and have returned them to the funder on time.

All this will make you look more professional and as if you are sensible safe hands to administer their money.

## Applications

When writing a new grant application, follow this system:

1. Put the form in a drawer
2. Put up sheets of paper on the wall
3. Make a business case for your project
4. Then, and only then, fill in the form using the criteria you have developed in your Business Plan

Avoid jargon – use summaries.

Remember, most assessors are not full time or trained assessors, so make sure you answer questions simply and VERY clearly. For example, in response to: 'How many people will directly benefit from your project?' say that 'x number of people will directly benefit from our project through x contact sessions, y performances etc.' Many assessors won't even be familiar with your particular area of work so be clear.

If you are applying to a company's donations or corporate responsibility fund you will normally find this is administered by the human resources department or by the chief executive's personal assistant. You need to talk to them differently from grant giving funds. This process is far more paper orientated, as they need to ensure you are credible, so be prepared to cross the t's and dot the i's and send them everything you have.

Employee-led funding committees – these are funds donated and administered by the employees which are often matched by the company. In general don't bother with these as they are very led by social trends and tend to favour emotionally appealing causes only. Very fickle and hard to read – as they are committee led and personally biased.

Should you use a professional fund-raiser? In general, you're the one who has the passion about your project to make a bid stand out; professionals can edit or improve what you write but not add that spark.

(adapted from an article by Chris Wells)

## Useful resources and sources

**The Directory of Social Change:** Provides practical training courses including the [DSC Fundraising Training Courses](http://www.dsc.org.uk), running conferences, seminars, briefings and [Charityfair](#) (the biggest annual training forum for the sector). Researching and publishing reference guides and handbooks <http://www.dsc.org.uk>.

**Writing Better Fund-Raising Applications - A Practical Guide**, written by Mike Eastwood & Michael Norton – 4th Edition £19.95 <http://www.dsc.org.uk/Publications/Fundraisingtechniques/@2929>

**DSC On-line database of trusts** (needs a subscription) <http://www.trustfunding.org.uk>

**Lottery Funding:** Is a joint website run by all Lottery funders in the UK. This site allows you to search information on current funding programmes across the UK. <http://www.lotteryfunding.org.uk>

**Funder Finder:** Is operated for the Central Council of Church Bell Ringers [brcchairman@cccb.org.uk](mailto:brcchairman@cccb.org.uk)

**Funding Central:** Is a free resource for charities, voluntary organisations and social enterprises. It is funded by the Cabinet Office and lists thousands of mainly local funding opportunities, plus a wealth of tools and information <http://www.fundingcentral.org.uk>

**Your local Guild or Association:** A number of Ringing Centres have been set up with the support of the local Guild or Association, with financial support either centrally, or at District/Branch level. Even though the amounts are likely to be relatively small, perhaps only a few hundred pounds, this does help demonstrate the breadth of local support, which is essential when making applications for larger amounts from trusts and charities.

**The Ringing Foundation:** Was established in 2007. The Foundation provides 'seed corn' grants to support projects, but normally expects projects to become self-supporting. Projects must relate to at least one of the Foundation's aims: to raise the public awareness and understanding of change ringing, to aid the recruitment of ringers, especially young ringers, and to enhance the quality and quantity of training through the Integrated Teacher Training Scheme (ITTS) and the Learning the Ropes Curriculum. The Foundation does not give funds to projects to re-hang or augment rings of bells, but may provide grants towards teaching equipment and public relations materials depending on the nature of the application.

**Public bodies:** Most Local Authorities (LA's) provide a range of small grants to local community groups. You will need to stress the benefit to the wider community e.g. Educational and youth aspects, rather than the religious benefit. The Yorkshire Dales Ringing Centre was successful in obtaining a £500 grant from their Local Authority after making a presentation to a local Community Forum. Local Authorities and Housing Associations (RSL's) also support school holidays activities programmes. If you ran a course for young people that fitted with their criteria, this may be eligible for funding. There have been several instances where courses have been run as part of a Local Education Authority (LEA) evening class programme. e.g. the Prittlewell Ringing Centre. Local Authorities are also able to support applications to the National Lottery distribution bodies, and it is worth enlisting the support for your project. They may also be able to help with identifying other local sources of funding, especially where projects involve an education and youth component.

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**The Landfill Communities Fund:** Is a source of money for some organisations to carry out certain types of environmental projects. A company, trust, charity or club can apply for funding for certain types of projects. Clubs can get funding from Band D which funds projects that develop communities using recreation and sport which are within 10 miles of a landfill site. Details on the scheme is available in the [Landfill Communities Fund - An Introduction](#) (PDF 2MB). This funding can be accessed two ways. Either by going straight to a landfill operator in your area (more difficult route) or by going to an environmental body who distribute landfill tax funds. These organisations are invariably trusts and either operate on a very localised basis or a national basis. Each has its own funding priorities but most seem to offer support in doing the application and they can fund anywhere from £500 - £100,000.

**William Hartley Memorial Fund:** The objective of the William Hartley Memorial Fund is to help and encourage handbell ringers and teams in many different ways.

- Through the generosity of Handbell Ringers and instrument suppliers, the WHMF is able to offer on loan Handbells, Belleplates® or Musical Chimes to members of HRGB. Instruments are available for periods of up to one year to those who wish to become involved in making music and developing their ringing skills.
- Since so many teams are hungry for funds to purchase new bells, to add to their set of bells or to overhaul and retune old bell sets before they can start ringing and/or make serious progress, The Fund makes interest-free loans available for this kind of support.

The Fund will consider supporting any project that will further the cause of Handbell Ringing.  
<http://www.hrgb.org.uk/index.php/whmf>

**Big Lottery Fund - Awards for All England:** Is a scheme run by the Big Lottery Fund. The scheme awards grants of between £300 and £10,000 which deliver one or more of the following outcomes:

- People have better chances in life – with better access to training and development to improve life skills.
- Stronger communities – with more active citizens working together to tackle issues within the community.
- Improved rural and urban environments – which communities are able to better access and enjoy.
- Healthier and more active people and communities.

You can apply at any time. The application form is short and simple and you will be told if you are successful or not within 30 working days of a completed application. There are similar schemes for other countries in the UK.

<http://www.biglotteryfund.org.uk/global-content/programmes/england/awards-for-all-england>

A considerable amount of money has been given to ringing related projects. This includes both handbell and tower bell related activities, although the greater part has been towards community groups purchasing sets of handbells, belleplates and handchimes. A 'Taster Weekend' organised by the Marlesford ringers was one of the projects supported, as well as the practice bell at the Troyte Ringing Centre. Kidderminster also received £5,000 towards improving public access to their bells. The Big Lottery Fund awarded £50,000 to a project to restore the bells in St James Church in [Little Paxton](#) so that the villagers would be able to hear the church bells ring for the first time in over 100 years.

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**Heritage Lottery Fund:** The fund distributes money raised by the National Lottery to support all aspects of heritage in the UK, from historic buildings and museums to archives, nature conservation and oral history. Grants can include both capital and time-limited activity grants. Activities that increase people's understanding and enjoyment of heritage are also supported. Therefore PR projects that inform people about the heritage of bells, bellfounding, ringing and belltowers, and encourage participation in heritage meet the criteria and are therefore eligible for funding. The Worcester Cathedral Teaching Centre obtained a HLF Grant for a 'Bells in the City' exhibition along these lines.

<http://www.enrichdesign.co.uk/print-design/bells-in-the-city-exhibition-design/>

**Sharing Heritage:** Is a small grants programme for any type of project between £3,000 and £10,000, related to heritage in the UK. Under this programme, HLF funds projects that make a difference to people, heritage and communities in the UK. Projects must have not yet started and last no longer than one year.

**Start-up grants:** Are for anyone thinking about creating a new organisation to look after or engage people with heritage, or existing groups taking on new responsibilities for heritage, between £3,000 and £10,000. Start-up grants can support the early stages of planning activities. If you are further along in your development, a start-up grant can also help new organisations to explore options for managing and sustaining heritage in the future, or carrying out early scoping work to inform a future application for project funding.

**Young Roots:** Funds partnerships of heritage and youth organisations to help young people aged 11-25 shape and deliver their own projects, valued at between £10,000 and £50,000. Young Roots projects stem directly from young people's interests and ideas, harnessing the creativity and energy and helping to work with others in the local community.

**Our Heritage:** Funds projects between £10,000 and £100,000 that make a lasting difference for heritage, people and communities in the UK. Projects must focus on heritage, which includes many different things from the past that we value and want to pass on to future generations, for example caring for the natural landscape, conserving historic buildings, places and objects, involving people in exploring local cultures, traditions, languages and ways of life. HLF describe the difference that they want to make through a set of outcomes, which you can find out more about on their website.