

# Fundraising tips and guidance for Parent Carer Forums

October 2022



**12:00 -12:35:**

Charitable Trusts and Foundations

Application Cycle:

1. Case for Support
2. Research
3. Applying
4. Thanking, Reporting and Renewal

Additional Support

**12:35 – 13:00:**

Q&A



# Types of Charitable Trusts and Foundations

Trusts and Foundations

Corporate Foundations

Community Foundations

National Lottery Community Fund



More info: [Chartered Institute of Fundraising - Grants and trusts \(ciof.org.uk\)](http://ciof.org.uk)



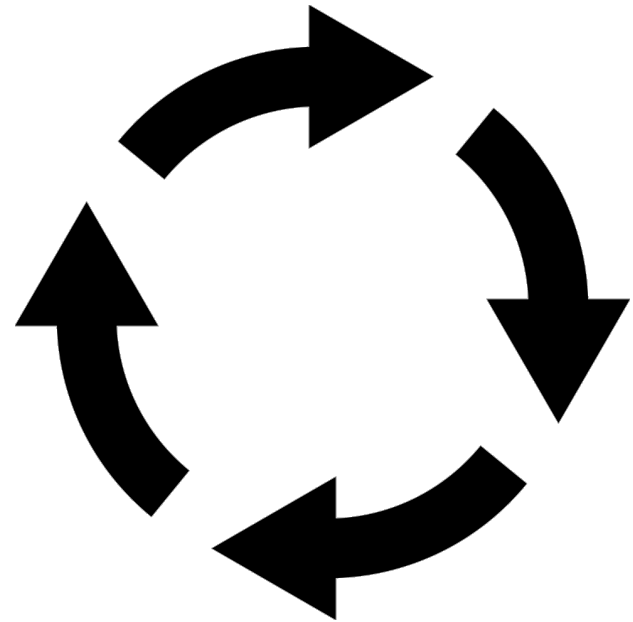
# **Application Cycle**

**STAGE 1: Case for Support**

**STAGE 2 : Research**

**STAGE 3: Applying**

**STAGE 4: Thanking, Reporting,  
Renewal**



## STAGE 1: Case for Support

- Your case for support should sell your story, organisation, project and work clearly and concisely
- Your case for support should bring your work to life and should make a funder want to support you
- Core elements you need to get across



# STAGE 1: Case for Support

## Using Statistics

- Using stats and figures in your applications can be a real asset to your case for support and highlights the need
- EXAMPLE:
- *“Recent research through the Disabled Children’s Partnership, found that 9 in 10 disabled children and their families were socially isolated (Then There Was Silence, 2021)”*



# STAGE 1: Case for Support

## Sources for statistics

Disabled Children's Partnership – [‘Then There Was Silence’](#) (2021)

Contact – [‘Counting the Costs’](#) (2021)

GOV.UK – [‘Special Education Needs in England’](#) (21/22)

[Disabled Children's Partnership](#)  
[GOV.UK Statistics](#)  
[Action for Children](#)



## STAGE 2: Research

What is their funding criteria? Is your forum eligible?

What are their rules around applying?

Who have they previously funded and for what size of grant?

Use directories such as the Charity Commission Register to search by local area/objectives to find trusts that will support your work.

<https://register-of-charities.charitycommission.gov.uk/charity-search>





## STAGE 2: Research

### *Where to find Trusts and Foundations to apply to*

[The Charity Commission](#) – has a search function where you can filter for grant giving bodies

[Charity Excellence](#) – lists of funders and other fundraising resources

[Community Foundations](#) – search function to find your local Community Foundation

[National Lottery Community Fund](#) – range of funds available to apply for



# STAGE 2: Research

## Using websites



SEARCH...  MENU 

[Home](#) › [Apply to Us](#) › [How to Apply](#)

### APPLY TO US

[Grant Programmes](#)

[How to Apply](#)

[FAQs](#)

[Eligibility Quiz](#)

### How to Apply

We appreciate that applying for funds can be time consuming so we aim to make our process as simple as possible.



We wish to appreciate the distinctive nature of your charity so we don't use

### GWF Application Guidelines July 2022

(pdf 4 MB)

[VIEW](#)


[Apply now](#)

[APPLY NOW](#) 



# STAGE 2: Research


## Using the Charity Commission

 CHARITY COMMISSION  
FOR ENGLAND AND WALES

English Cymraeg


[Log in to digital service](#)

About the register of charities

Search 

# KUSUMA TRUST UK

Charity number: 1126983

 Charity reporting is up to date (on time)

[Charity overview](#)

[What, who, how, where](#)

[Governance](#)

[Trustees](#)

[Financial history](#)

[Assets and liabilities](#)

[Accounts and annual](#)

This table shows the charity's record of submitting annual returns, accounts and trustees' annual report (TAR) for the last five financial periods.

Title	Reporting year	Date received	Received	Download
Annual return	31 December 2021	07 July 2022	On time	
Accounts and TAR	31 December 2021	07 July 2022	On time	<a href="#">Download</a>
Annual return	31 December 2020	23 July 2021	On time	



## STAGE 3: Applying

### Application process

- Differs depending on funder
- Might be a simple online form or a three stage process
- Some trusts publish their meetings dates or have open application cycles all year round. Decisions can take up to 9 months +



# STAGE 3: Applying

Part two

## Your project

### Project details (Step 1 of 4)

#### What is the name of your project?

The project name should be simple and to the point.

#### When would you like to start and end your project?

If you don't know exactly, your dates can be estimates. But you need to start your project at least 15 weeks from when you plan to send us your application.

We usually only fund projects that last 15 months or less. So, the end date can't be more than 15 months after the start date.

#### If your project is a one-off event

Just let us know the date you plan to hold the event in the start and end date boxes below.

##### Start date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

##### End date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Project details (Step 2 of 4)

#### What council will your project be based in?

If your project covers more than one council, tell us the main one.

#### Tell us the towns or villages where the people who will benefit from your project live

National Lottery Awards for All Northern Ireland Application form

August 2019

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Your progress ● ● ● ● ● ● ● ● ● ●

### What is the postcode of the location where your project will take place?

If your project will take place across different locations, use the postcode where most of the project will take place.

### Project idea (Step 3 of 4)

#### What would you like to do?

Here are some ideas of what to tell us about your project:

- What you would like to do.
- What difference your project will make.
- Who will benefit from it.
- How long you expect to run it for. This can be an estimate.
- How you'll make sure people know about it.
- How you plan to learn from it and use this learning to shape future projects.
- Is it something new, or are you continuing something that has worked well previously? We can fund both new and existing projects.

National Lottery Awards for All Northern Ireland Application form

August 2019

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# STAGE 3: Applying

## Common Application Questions

What are the aims and objectives of your organisation?

How many beneficiaries will you reach?

What is your budget for the project and how much are you asking the trust to contribute to it?

How will you monitor and evaluate progress?

How will you fund this activity going forward?

What is your annual income/expenditure?



## STAGE 3: Applying

### Additional Documents

Funders may also require you to provide additional information and documents including:

- Set of financial accounts/records
- Safeguarding Policies
- Constitution document
- Copies of Bank Statements
- Other policy documents



## STAGE 4: Thanking, Reporting, Renewal

### Thanking your Donor

- When you receive your grant, be sure to thank and acknowledge the donation
- Formal acknowledgement – We recommend a formal letter acknowledging the donation





# STAGE 4: Thanking, Reporting, Renewal

29 September 2022

Dear Trustees,

We were delighted to receive the most generous donation of £500 from The John Charitable Trust to help us support children with disabilities and their families through life-changing products and solutions.

Through our Fledglings service, Contact is able to provide affordable, practical products and solutions that families tell us can make all the difference to their daily lives. We are now also able to provide access to specialist advice and support on caring for a disabled child to underpin this work. This couldn't be done without your support.

We have also recently updated the Fledglings website which you can find at [www.fledglings.org.uk](http://www.fledglings.org.uk).

On behalf of everyone at Contact and all our beneficiaries please accept our gratitude for your support in helping us to achieve this.

Please also accept this letter as a receipt for your records. Should you require any more information, please do not hesitate to contact me using the details below.

Yours sincerely,

A handwritten signature in black ink that reads "J. Garman". The signature is written in a cursive style with a horizontal line underneath the name.

# STAGE 4: Thanking, Reporting, Renewal

## Reporting and Renewal

- At the end of the project or after 12 months, report back on what you have used their funding to do
- Some funders will have specific reporting formats or timelines e.g. an online form, or quarterly reports
- Others won't ask for a report. We recommend sending one – a report is also an opportunity to request they renew their support for another year



## Need any help?

- Get in touch – [fr.team@contact.org.uk](mailto:fr.team@contact.org.uk)
- Monthly drop-ins – Details to follow
- Opportunities to collaborate with Contact

