# Writing the strongest applications in the shortest possible time

# A NOTE FROM LISA

I paused before sealing the envelope. I didn't know it then, but this would be a life-changing moment! The year was 1999, several years before I had succumbed to multiple email accounts, social media accounts, and could video call my Mum from my kitchen whilst streaming a blockbuster movie to my smart TV.

The envelope in question contained an application to a Grant Funding Scheme called Awards for All, which was part of the still relatively new National Lottery. Mystic Meg was the best way to predict the lottery results at that time and I could have really done with her help at that moment!

I was fresh out of University and had just begun a new job as a Rugby League Development Officer based in one of the games 'out posts' the North East of England. Fuelled on enthusiasm (rather than knowledge) and passion (rather than skill) I needed to find a way to develop the game in an area that was more known for its football.

To be honest, I had no idea what I was doing! I was a coach, a player, I was comfortable and confident on a rugby pitch, but this business of grant applications was a completely new world to me.

The envelope was posted, forgotten about, and I moved on to a fresh set of challenges, tasks and seemingly never-ending problems. .

A couple of months later, a large white envelope arrived at my desk, 'Congratulations' it said.

I'd secured funding to not only support the development of rugby league in the North East – I'd managed to wangle funding to set up a girls team – woohoo, Gateshead Thunderbirds were on their way to the next level! And so, began, a 20-year journey negotiating the often confusing and sometimes overwhelming grant funding landscape.

Of course, our current 'Covid19' crisis has really turned our world upside down. Many funders are only responding to grant applications that deal with the current emergency, some have paused altogether. None of us know what the next few months will bring, but we do know that money will be a central focus to 'what happens next'.

One thing is for sure. There has never been a better time to become more confident, more knowledgeable and more skilled about the grant funding world

*Lisa Jagger*

**Lisaa Jaggerr**
**Founder of Straight Forward Funding.com**

# WORKSHOP OUTCOMES

☐ CREATING A FACT FILE

☐ ESTABLISHING YOUR WHY/HOW/WHAT

☐ DEVELOPING A PROJECT MAP

☐ SIMPLE STRUCTURE FOR APPLICATIONS

☐ TECHNICAL TIPS & STRATEGIES

Many of the tips, strategies and ideas included in this workshop have been adapted and developed from a range of resources, books, documents and training that I have encountered over the last 20 years. Some are so far in the past that I can't remember where I learned them, so cannot acknowledge the creators.

However, some elements are inspired and adapted from the fantastic book "Writing Better Fundraising Applications A Practical Guide (Fourth Edition) by Mike Eastwood & Michael Norton – and this is the one single resource I most recommend purchasing if you can get your hands on it!

I also attended a number of bid writing workshops facilitated by www.idoxgroup.com which I would also highly recommend.

We never stop learning; and learning from a variety of sources is always going to be beneficial, so please, just use this resource, and accompanying workshop as a springboard to future development.

# SECTION ONE

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# SECTION ONE

## CREATING A FACT FILE



Taking heed of the advice 'If I need to do it more than once, I need to have a system', you are going to pull together a fact file.

I would recommend that this is an electronic document – and even better if it can be placed in a shared folder, so that other people can add to it, and access it too.

If you want some extra help and accountability – then sign up to the:
 Straight Forward Funding: Free 5 Day Challenge -
https://lisa-42cff.gr8.com/

But if you just want to get going:
- Using the resource provided on the next page, pull together the information and put a note in your diary to check and update it on a regular basis (probably every 3 or 6 months).
- If you don't have the information to hand, make a note of who does, and once you have worked through the document, contact them for any outstanding items.
- This is a working document – you may find that you want to add to this list, as you begin to write funding applications. Essentially, this is a list of commonly asked questions – focused around bits of information that don't tend to change very often.
- This is information about your organisation – not information about projects or activities that you want to do.

Remember – if you are asked for the same information more than once, it is worth including in your fact file.

*Be mindful of regulations such as GDPR when recording any personal data.*

**Template Fact File** *(Head to my website to download a free, fillable version)*

| | |
|---|---|
| Last updated on | |
| Last update by | |
| Mission statement | |

| | |
|---|---|
| **Contacts & Media** | |
| Name of organsisation | |
| Registered Address | |
| Website | |
| Facebook | |
| Twitter | |
| Instagram | |
| You Tube | |
| Public Email Address | |
| Public Telephone | |
| Legal Status (eg. CIC) | |
| **Reference Numbers** | |
| Company No | |
| Charity No | |
| DfE No | |
| OfSTED No | |
| VAT No | |
| Date Founded | |
| **Finance** (last financial year) | |
| Total Income | |
| Total Expenditure | |
| Name of Bank | |
| Address of Bank | |
| Bank Account Name | |
| Bank Account No | |
| Bank Account Sort Code | |

**Template Fact File**

| | |
|---|---|
| **People Involved** | |
| Chair | |
| Secretary | |
| Treasurer | |
| Board of Governors | |
| Senior Leadership | |
| No of Full-Time Staff | |
| No of Part-Time Staff | |
| No of Volunteers | |
| No of Members | |
| **Statistics / Data** | |
| BAME | |
| SEND | |
| Pupil Premium | |
| CIN | |

# SECTION TWO

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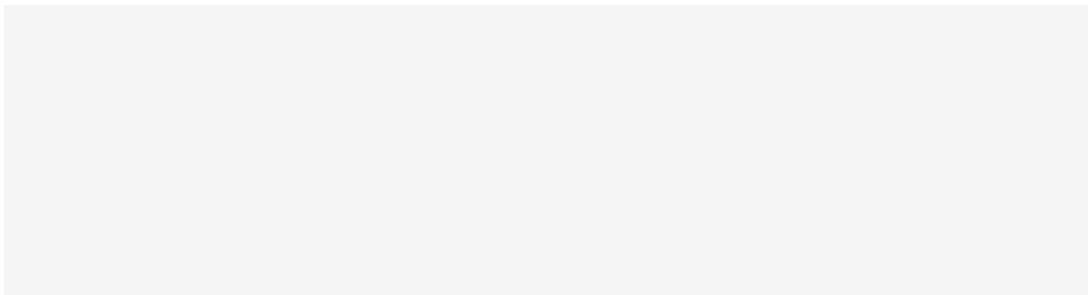
# SECTION TWO

## ESTABLISHING YOUR HOW, WHY AND WHAT
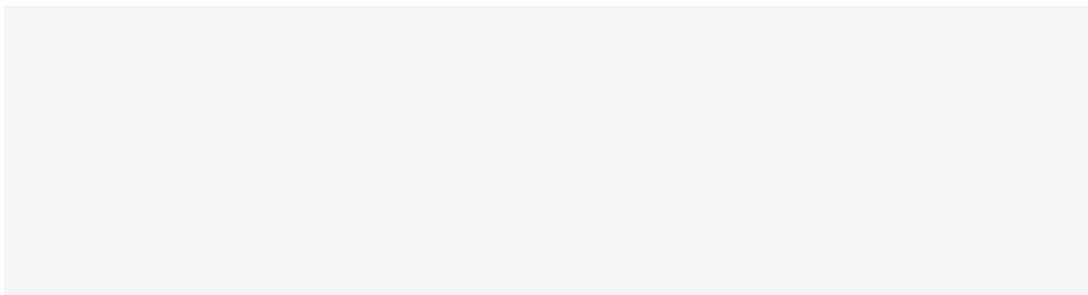
Watch this YouTube clip: Simon Sinek, The Golden Circle
https://www.youtube.com/watch?v=7dAaWweraQ4

Can you identify the key elements of the Why, How and What for your organisation?
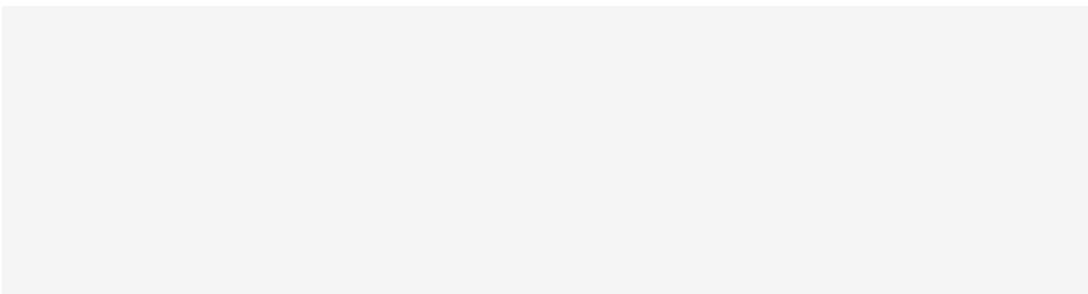
**WHY?**  Purpose, Cause, Belief, Story

**HOW?** Values - Methodology, Place based, Outreach, Training/awareness

**WHAT?** We create, We support, We help, We play.  Outcome/Difference

You could also map out your why, how and what for your projects.

| THEME | START WITH **WHY** | THEN DECIDE **HOW** YOU ARE GOING TO APPROACH THIS | **WHAT** ARE THE ACTUAL THINGS THAT WILL TAKE PLACE? |
|---|---|---|---|
| *Community Engagement* | *We have talked to local people and they have told us that....* | *Partnership working with.... Co-producing projects by...* | *We will deliver* |
| | | | |
| | | | |
| | | | |
| | | | |

# SECTION THREE

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# SECTION THREE

## DEVELOPING A PROJECT MAP

Establish your Theory of Change:

| | | |
|---|---|---|
| Problem | Medium Term Outcomes | Long Term Impact |
| Cause | Short Term Outcomes | Vision |
| Root Cause | Actions | |
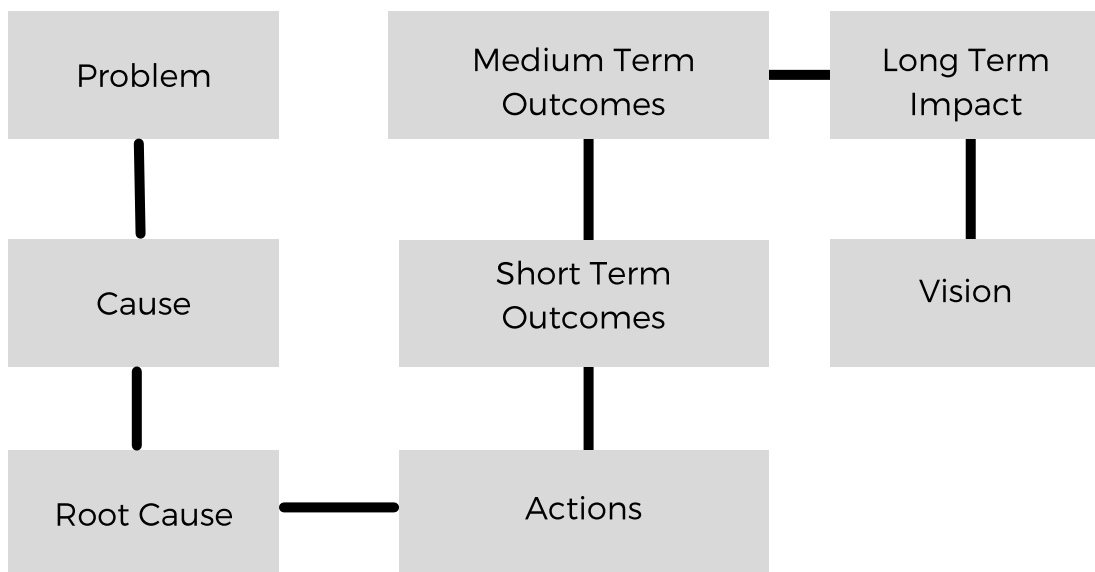
The Theory of Change is covered in much more detail in the Workshop 'How to show funders that you really do make a difference'.

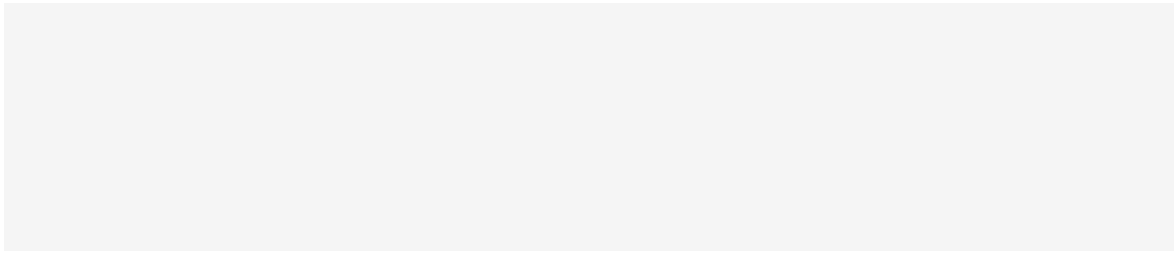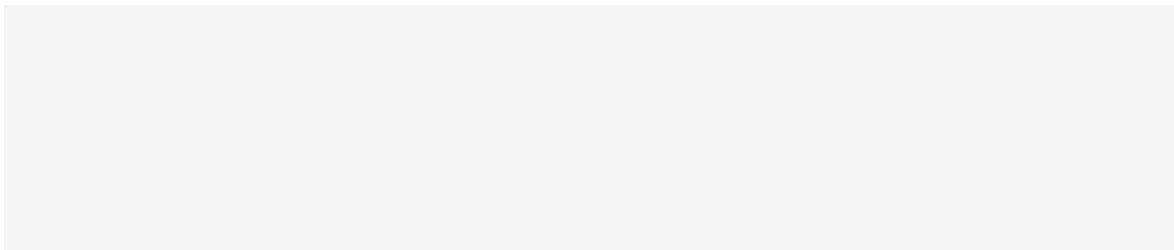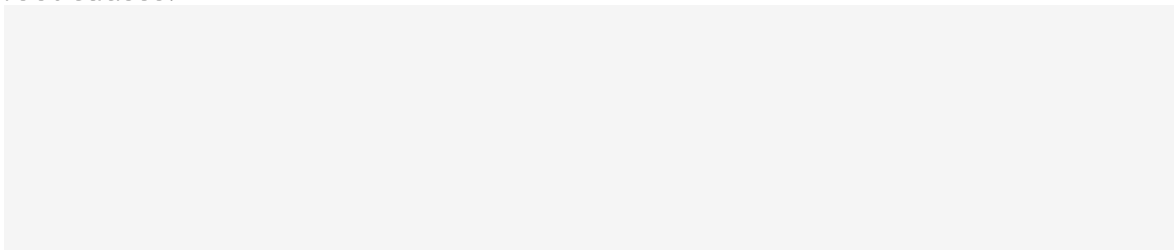| A. Current Reality | B. Future Vision |
|---|---|

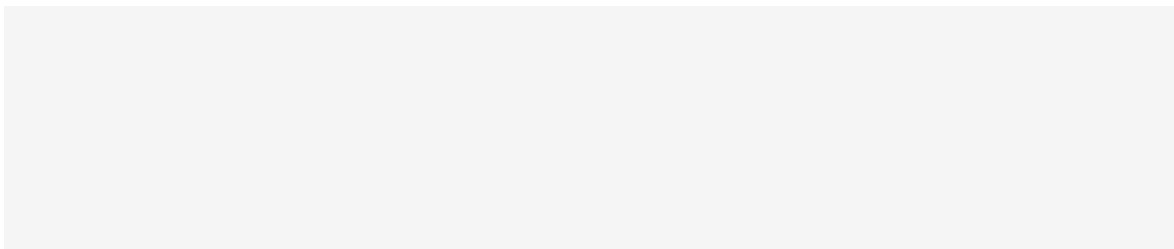Think about how you will get from A to B – what is the current reality, or situation?

What are the problems or challenges?

What causes these problems or challenges? Can you dig deeper and identify any root causes?
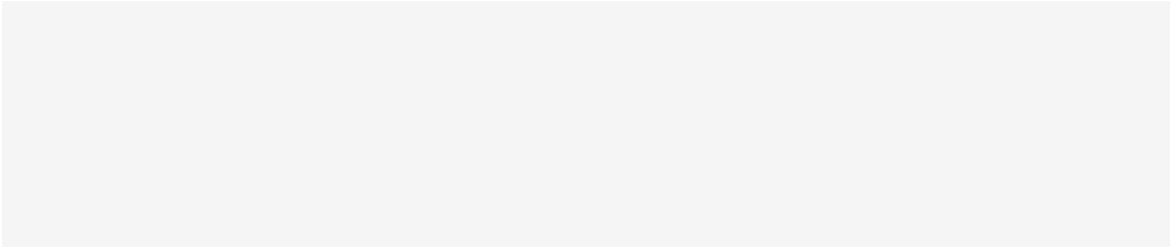
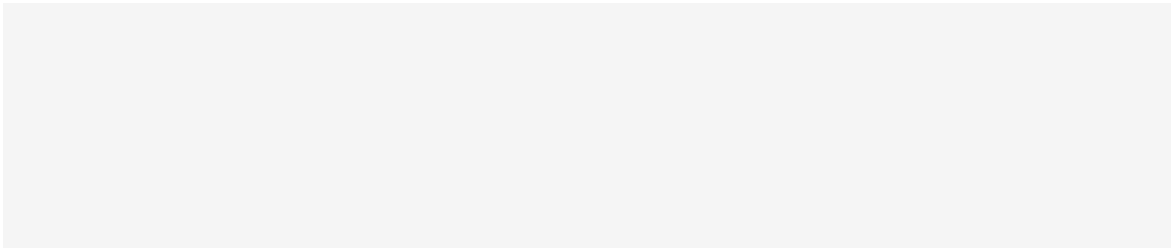What do you want to do about it?  Why do you think this is a good idea?

What difference will it make in the first few months?

What difference will it make after a year or so?

## Project Outline

Why bother creating a project outline?  Quite simply, it will save you time in the long run!

Particularly for larger projects, you may discover that you need to write multiple applications to receive the funding you are seeking. You may need to write different applications for different sections of the overall project.

You may come across several funders that are a 'fairly good match' – but their guidelines prevent you from applying for the full amount of funding you need. Bear in mind that:
- some funders will only part fund projects
- some funders will only fund whole projects
- some funders will only fund revenue costs
- some funders will only fund capital costs

A project outline will deter you from becoming 'funding led'. This document provides the true vision for your project – what you and your organisation really want to do.

Many funders put strict parameters on what they will and won't fund, and the changes they want to see happen as a result. Developing a project outline will help you decide whether the Funder is a good match for your project and subsequent application; you will increase your chances of success by only applying to Funders that are a good match.

It will help you focus your thoughts supporting you to set visionary goals including:
- Long term targets and outcomes
- Short term targets and outcomes

It will help you shape your ideas, clarifying the reasons behind the project, helping you think through strategies and delivery methods and supporting you to analyse what systems and structures you have, need or want to develop.

If you leave your organisation, other staff or volunteers will be able to pick up where you left off, providing consistency and continuity and it will enable multiple people to apply to different funders (which means you don't need to do it all yourself!)

The following questions can be used as a guide to begin thinking in more depth about different aspects of your project. You will be able to use this information in future applications. Bullet points are fine for now but be mindful to capture the true essence of your project, what you REALLY want to do, why, and what difference it will make to your pupils, their families and your wider community.

Again, this can be done in a group setting – or you can ask specific volunteers, staff or trustees to give you feedback for individual questions.

A grant application is at its strongest if the whole organisation understands, supports and contributes to the development of the application.

## Project Outline

Last updated on:

Last updated by:

This works well if you interview a co-worker via Zoom or similar, use the questions below for the interview – and record the whole conversation If you really want to get fancy – upload the video to Otter.AI and get it transcribed for you!

Describe your project 'In a Nutshell'. (It might be easier to do this one last)
Focus on the project you are asking to be funded – not a description of your organisation.
- What you will do
- What problem you will solve
- What difference it will make

(You may want to come back to this question at the end – this is effectively a summary)

What is the need for this project?

How can you prove that there is a need?

Will you be working in partnership with any other organisations?

Why does the project need to take place now?

What is the overall aim of the project?

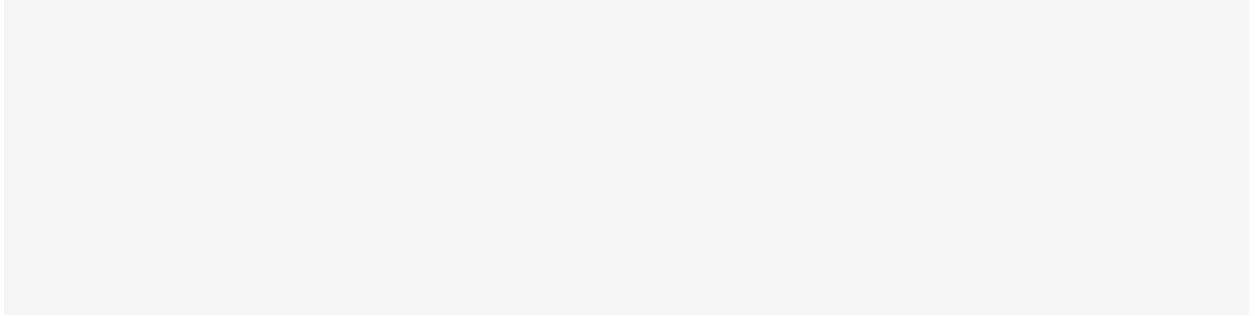How will you know if the project is successful?

What will you actually do?

Will participants be involved in the development and delivery of the project?

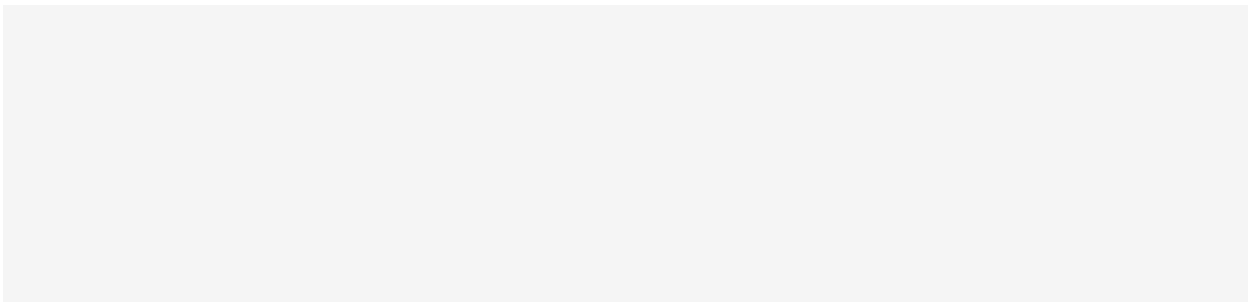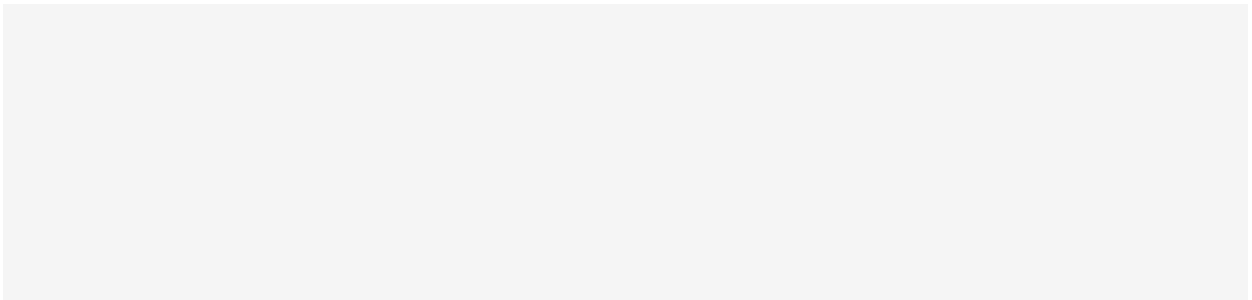Will any volunteers be involved in the project?

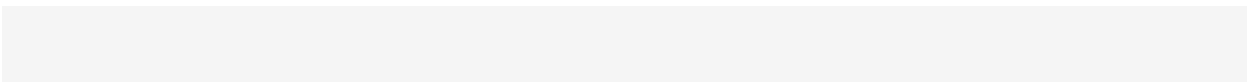How will you share the outcomes of your project?
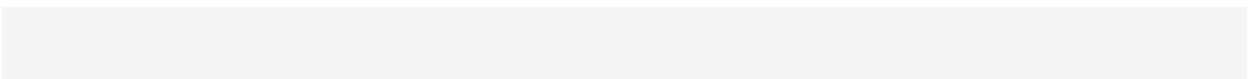
How will the project be evaluated?

What will happen when the project (or project funding) comes to an end?
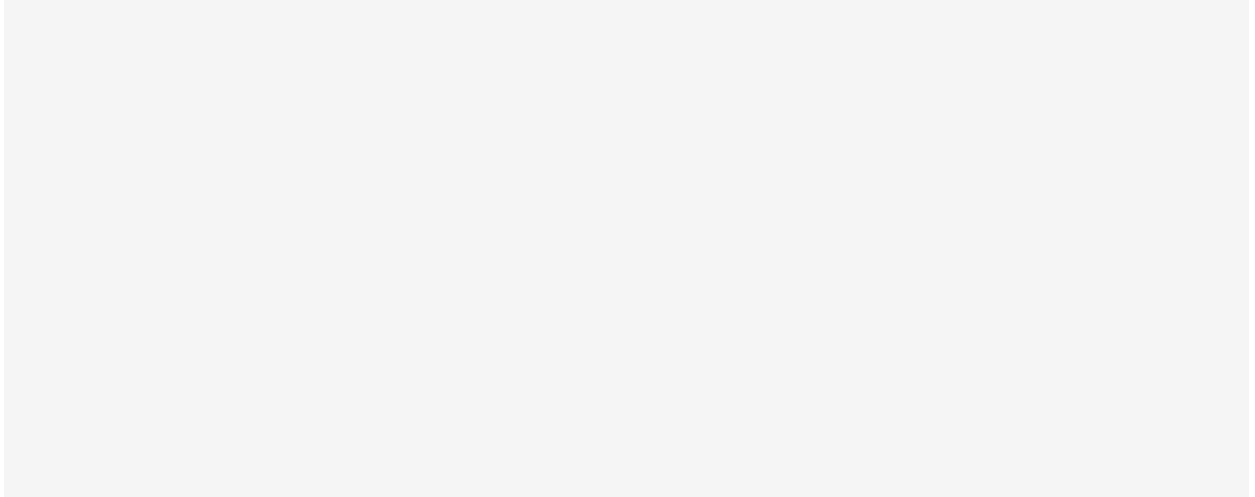
Estimated start date of the project

Estimated completion date of the project
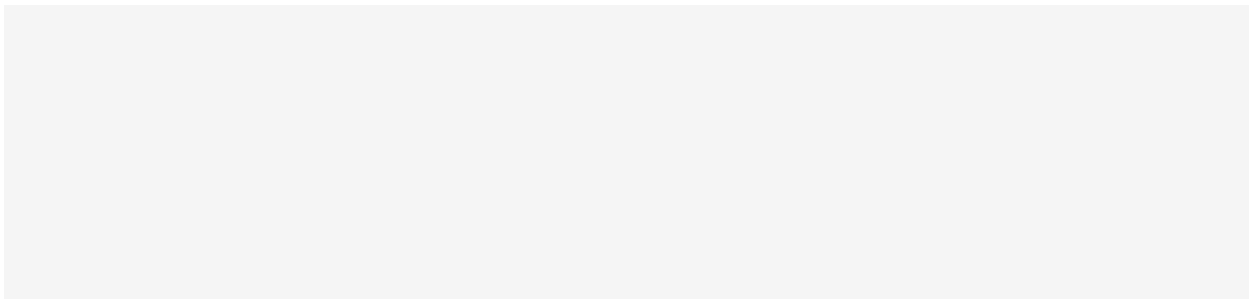
Key people involved and relevant experience:

What makes you the best organisation to deliver this project?

Finally, Remember to go back to question 1 and summarise all this information 'In a Nutshell'!

When summarising – you are trying to grab the reader's attention. You don't want them to think 'So What'! You do want them to think: 'This sounds intriguing, this sounds interesting, I'm looking forward to finding out more'.

# SECTION FOUR

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# SECTION FOUR

## A SIMPLE STRUCTURE FOR APPLICATIONS

**Introduction** - What pictures would you like the reader to visualise when they read your first paragraph?

**Presentation** - Can you describe the aims, outcomes and long term impact of your project, or organisation, in less than 50 words. Start with 5 short bullet points.

**Short Story** - Don't think about elephants! We read words, but think in pictures. How can you tell the story of your project in a way that makes it instantly possible to visualise?

**Close** - Can you list here what you are asking the funder to give you? Make sure this is crystal clear in your application.

**Consolidate** - In a nutshell – can you summarise the above points in one paragraph? Can you do this in 50 words? 10 words? Focus on the essential, eliminate the rest.
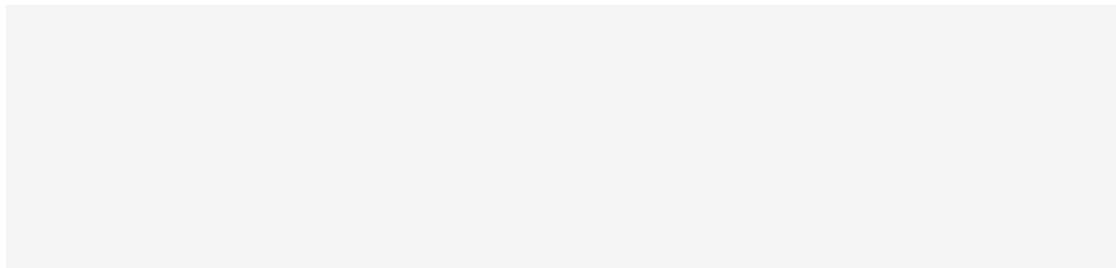
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# FIVE

# SECTION FIVE

## TECHNICAL TIPS & STRATEGIES

**Write in plain, simple English**

- Assume your reader knows nothing about your organisation.
- Avoid using jargon – and make your text as easy to understand as you are can. Don't assume that your reader knows what KS1, Ed-Psych, CPD, NC, PSP means!

Make a note of any technical jargon you tend to use here:

- Imagine a specific person that you are writing to, give them a name, make them real – keep that picture in your mind as you write. Will they understand what you are trying to put across?
- Draft your answer in a word document (or similar) so you can use the word count, spell checker and grammar checker functions.
- Does your word processor have a 'Read Aloud' function? You may find this under the 'Review' tab. Listen to your content, does it flow, does it make sense?
- Investigate online tools such as
  http://countwordsworth.com/wordspersentence

**Keeping to the word count**

- Check that it is a word count and not a character count!
- Divide the wordcount into chunks of 15 – 20 words (500 words = 25 sentences of around 20 words)
- Have a good think about the question you are trying to answer, and then list 25 bullet points of information that you think are relevant.
- Turn each bullet point into a sentence. Of course, you will still have to fine tune, but this should help you set off in the right direction. Make sure your most important sentences are at the beginning.

**Bonus Feature:** Check out my WOW Words Blog Post (https://straightforwardfunding.com/wow-words/) that includes a fantastic list of powerful words and phrases to provide inspiration for writing your application.

## Workshop Checklist

|  | Do I understand how to do this? | Where can I get more help? | Have I done it yet? | Date completed |
|---|---|---|---|---|
| Creating a Fact File |  |  |  |  |
| Establishing your How/Why/What |  |  |  |  |
| Developing a Project Plan |  |  |  |  |
| Technical Tips and Strategies |  |  |  |  |

**Some Common Terminology**

**Grant:** A grant is not a gift. A grant is a sum of money awarded to achieve a specific purpose.

**Inputs:** The things your organisation will do to achieve the project

**Outputs**: The activities or services that will take place as a result of your project or activity.

**Outcome**: The measurable difference your project or activity will make.

**Impact**: Long term difference.

**Objective**: A clear goal, that can be defined and the results measured

**Budget**: An itemised list of anticipated income and expenses, and must closely reflect the project you have described in your application

**Capital Funding**: Funding that can help you construct or renovate a space or building

**Revenue Funding**: Costs relating to the delivery of your specific project or activity.

**Sustainability**: The measures you put in place to continue to make an impact once the project funding is finished.

**Unrestricted Funds**: Funding that can be spent on any aspect of your organisation.

**Core Costs**: Costs such as utilities or salaries, that are not directly linked to your project or activity, but are vital to your school as a whole.

# NOTES

# Need a helping hand?

Sign up for my **free monthly newsletter** to hear about future training, events, resources and much more https://straightforwardfunding.com

Join my **free Facebook Group** and receive regular updates about a wide range of Grant and Trust funds https://www.facebook.com/groups/SFFunding

Follow my **Facebook Page** for regular tips, resources, and ideas: https://www.facebook.com/straightforwardfunding

Read through my previous blog posts  https://straightforwardfunding.com

No need to struggle on alone, join the **Straight Forward Funding Membership** programme. A low cost, high impact way to improve your likelihood of grant funding success.
https://straightforwardfunding.com/membership/register/

## See what others have said about
## Straight Forward Funding Workshops, Resources and Membership Programme:

"Great principles to work by, reaffirming long ago training and I think we forget the importance of this at times."

"I really like how concise and to the point these sessions are. No padding, all useful and practical."

I have attended three of your sessions and they have been very useful, timely and practical tips. Thank you

"Thanks Lisa, great workshop and really practical resources."