

SOFII Top Tips

# Ten things you should remember when writing to trusts and foundations

by Jo Habib, author,

*Tiny Essentials of Raising Money from Foundations and Trusts*

As with all fundraising, you really need to think about what you are doing from the foundations' – the donors' – perspectives. If you were them, what would you want? How would you want to be approached? What would you want to know?



You have to read an awful lot of applications, so you'd want something short, clear and concise; but also something comprehensive, something that gives you a feel for the organisation. You'd be cynical - you get too many letters that say, 'just give us £10,000 and we'll change the world forever'. But you'd still hope to see an application that looked as if it really might change some part of the world forever. In short, you'd want the impossible.

So to do the impossible, to be businesslike and passionate, concise and comprehensive, you need to consider the following.

**1. What you say about your *organisation*.**

You may need to mention its name (if it isn't clear), when it was established, where it works, size, mission and what it does. All in a tight paragraph! You may need to say what you've already done, but don't overdo the history. That you moved the head office 10 years ago is not likely to be relevant.

Bear in mind that charitable foundations are happiest giving grants to other registered charities. There is then no question about whether the money will be spent on charitable purposes. If you are not a registered charity, you may need to explain how you will ensure that the grant is used exclusively for charitable purposes.

**2. What to say about the *issue* you want to tackle.** Even if you want money to buy new IT equipment for your office, you're doing it in order to improve the services you deliver. It's no good saying that all the big cities near you have a concert hall, but you haven't. So what? You need to explain to funders why the lack of a concert hall is a problem.

Depending on the issue, you may need to provide evidence to back up your assertion. This might be statistical evidence or the results of research, whether quantitative or qualitative. Think carefully about the foundation you're writing to. For some, a well-chosen case history, or one revealing statistic, may be the right approach. For others, you might need to include more hard evidence.

**3 *How you are going to tackle the issue.*** You've established that there are many isolated elderly people in the area. How do you intend to reduce their isolation? There are lots of things that could be done, what is so special about your particular approach?

Or you've established that the lack of a concert hall diminishes the quality of life for a significant number of people and reduces the attractiveness of the area to investors. Why build a new concert hall? Why not arrange coach trips to other cities, or convert an existing building, or build an arts complex rather than just a concert hall?

The more you convey a sense that you've been through the details (without actually giving them pages and pages of it) the more convincing you'll be.

**4. *Why you should do the work.*** It may be obvious, but if it isn't, you need to explain. For instance, if you can't point to a history of successfully doing similar projects you should make a case that your organisation will bring fresh insights and a new approach to the work. If your organisation is new and doesn't have a track record, you should show that your trustees and staff have the relevant skills and experience.

**5. How much it's going to cost.** This is another area where you need to think really carefully about how much information to give. If there's a possibility that the foundation will consider you well meaning but woolly, the finances provide an opportunity to show that you're actually businesslike and focused.

You might consider providing some summary figures but also include a detailed breakdown of costs as an appendix. If the work you want funding for is 'more of the same', you'll be able to base the need on existing costs quite convincingly. But if you want to try a new approach, you'll need to show your figures are more than calculations on the back of an envelope.

Do you need to talk about other funding you're hoping to get? Do you need to specify how much you hope they will give? This can be a tricky area. If a foundation feels that its contribution will be just a drop in the ocean of your need, your application may well be rejected. You need £5 million, it makes maximum grants of £5,000 – what difference would its money make? What's the likelihood of you getting the other £4,995,000? An application that tells them that you have already raised 90 per cent of the money you need for the fabric of the new building, now you're trying to ensure that you have all the necessary funding to equip it, which just happens to cost £5,000... might be more effective.

On the other hand, foundations are often nervous about being the only funder. Clearly if a major foundation wants, say, a hospital wing named after it, the trustees will expect to contribute the bulk of the money and may not want other 'rivals' muscling in. With more humdrum donations, however, foundations are happy to be one of a pack. This reassures them that they've made a good decision (though they might remember the graffito '10,000 lemmings can't be wrong') and provides safety in numbers. They don't have to feel responsible for the continuation of the work when their grant comes to an end. So in general don't worry about mailing several foundations at once for the same thing, or about saying so.

**6. Why you are writing to them in particular.** You don't want them to feel that you found a list of foundations lying about, or you selected them pretty much at random. You want them to feel chosen, special. You've done your homework, you've read their guidelines, you think there's a fit between their objectives and yours... Think bunch of flowers and a meal out, not drunken pick-up after closing time.

**7. How you will be able to show what impact their grant will make.** This might not be important to some foundations, but others will want evidence that your work will make a difference. They'll also want to feel you care whether the work has the desired impact or not.

Depending on the kind of project, you may need to talk about your 'exit strategy' – what will happen when their grant comes to an end. Obviously, if they contributed to the construction of your hospice, or paid for trees to be

planted, this doesn't arise. But if they've paid for the salary of the hospice's outreach worker, they will be concerned about what happens next. By and large foundations hate feeling that someone will lose her job if they cease funding the work. They don't want the moral responsibility. Nor do they want to feel committed to a project for the foreseeable future.

You need to think through what will happen when their money runs out.

Vaguely hoping that something will turn up won't inspire confidence; at least try and put plausible flesh on the bones of your hopes.

**8. Credibility.** Someone involved in giving money away over a period of time likely to become cynical. At the extreme end, there have been cases of systematic fraud committed against foundations. More common are the applications that make exaggerated claims. You must, therefore, be able to demonstrate that your organisation has credibility and that your application is credible.

**9. Make your application the most appealing.** Imagine the most negative person you can. The kind of person who says 'so?' to everything. Or a really tenacious media interviewer. What sort of doubts might he or she express? 'Is this amount of money really justified?' 'Why do these people deserve our help?' 'Couldn't the money be better spent on...?' Go over what you've written and check that it stands up to the raised eyebrow and the 'so what?'. Checking what you've written is key. Some funding regimes require applications of 'no more than x thousand words'; grant-seekers often say that having to cut their application makes it much stronger. So look critically at length. Could you make the application tighter, leaner, shorter? Or would you lose all the flavour, all the colour that is going to make your application stand out? And then look critically at tone.

**10. Finally, get someone else to look at it.** Someone whose judgement you trust and opinion you respect. Someone who will be constructively critical of what you have written. Ideally you need someone who understands who you're writing for but who doesn't know too much about your organisation.

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