

EFFECTIVE GRANT WRITING & OUTCOME REPORTING WORKSHOP



GUERNSEY COMMUNITY
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promoting effective philanthropy

LLOYDS BANK
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Channel Islands



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AGC Conference 12 October 2024

WORKSHOP OBJECTIVES

1. Improve understanding of GCF, LBFCI, and SIF grant programmes and application processes
2. Improve your understanding of Outcomes Based Accountability (OBA) and the benefits of adopting it in your charity
3. Improve your understanding of how to report on outcomes



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Since 2020, SIF has awarded over £6 million towards a wide variety of charitable organisations

2 Grants Programmes:

Major Grants — applications for £25,000 +

Small Grants — applications up to £25,000

Outcomes:

- ❖ Improving the lives of people with specific needs, disadvantages or vulnerabilities
- ❖ Employment, education or training opportunities
- ❖ The protection of our natural environment, culture and heritage
- ❖ Improved health and wellbeing for our community
- ❖ An inclusive community, which challenges the barriers causing disadvantage or discrimination



GUERNSEY COMMUNITY FOUNDATION



Our grants programme is open to any charity, community group or non-profit organisation doing work in the Bailiwick.



Over the past 10 years we have distributed more than £3m to over 100 Guernsey charities across multiple fields, including mental health, the arts, younger people and the elderly.



Our main Guernsey Community Foundation (GCF) Grants Programme provides grants of at least £5,000 to local charities so that significant challenges or needs within the Bailiwick can be addressed.



Grant applications should show how the service or project, if funded, will address a proven area of concern, fill a gap in service provision within the Bailiwick, or improve the way a charity operates so that it can better meet the needs of the community or its service users.

LLOYDS BANK FOUNDATION FOR THE CHANNEL ISLANDS

We fund, support and champion charities in the Channel Islands that make a positive difference to the lives of people who are socially excluded and disadvantaged, enabling them to play a fuller role in the community. Alongside funding for charities in Jersey, Guernsey and Alderney, we provide developmental support including mentoring to help charities to improve their resilience and sustainability.

In 39 years, we have given more than £24m to charities in the Channel Islands.

Priority issues:

- Health including mental health or a disability
- Homelessness
- People leaving institutional care to live independently
- Addiction and dependency
- Loneliness and isolation
- Employment, literacy, financial literacy and debt problems
- Domestic violence
- Human rights

What we fund:

- Salaries
- Core operating costs
- One to three years of funding



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COMMON FEATURES

- Independent charitable funders but work in partnership
- Partner organisations supporting those in greatest need
- Support the sustainability of the charitable sector
- Set strategies and priorities
- Set eligibility criteria for grant programmes
- Finite pots of funding
- Open for applications all year round– with published deadlines
- Formal online application process
- Opportunity to meet or present to funders
- Decision-making bodies (Board & Panel)
- Conflicts of interest – decision makers will recuse themselves
- No appeal process
- Written grant agreement, terms and conditions
- Grant monitoring and reporting



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COMMON QUESTIONS

Eligibility criteria is subtly different for each funder, but all three ask variations of the following questions:

- Are you a registered charity / not for profit?
- What are your charity's aims, objectives, key services/activities?
- Explain your charity's outcomes and impact
- Due diligence:
 - Governance (local, UK charity, affiliation to UK charity)
 - Registration with relevant authorities
 - Organisational policies and practices incl. safeguarding
 - Membership of professional bodies
 - Financial Position including reserves
 - Key financial information incl. sources of funding
- What are you applying for / explain what the grant will fund?
- Financial breakdown of funding request
- How many people will be supported?
- Is your service / support unique?
- Partnerships and collaborations with others?
- What would happen if you didn't exist?
- What are your plans to fund and sustain this service/support?
- **Outcomes and impacts – what difference will you make?** This is what you will report on if successful



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SUPPORTING & OTHER USEFUL INFORMATION

Supporting documentation:

- Bank details - your charity needs its own bank account
- Annual Accounts
- Job descriptions (for funding requests for salaries)
- Business Plan or Project Plan

Useful Information

- You can apply for multiple funding requests in a single grant application
- For major projects - quotes
- We cannot normally provide retrospective funding
- An individual cannot make an application for their own salary



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THE APPLICATION PROCESS

- Look online to find out more about each funder and to check eligibility criteria
- Read and follow guidance for each funder and funding programme **before** applying
- All application forms can be accessed online and can be revised and resubmitted if needed
- Upload all additional documentation requested e.g. job descriptions, accounts, organigrams
- We may ask to meet you or contact you with questions or requests for additional information if we need to

Please call the relevant funder if you are still unsure about the process. We can...

- Give advice on how to apply
- Manage expectations: we may advise that it is not worthwhile applying at this time, saving you time; we may suggest you apply for a higher/lower amount; or apply to another funder
- Ask you questions early on, avoiding delays down the line



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DOS AND DON'TS

DO

- Answer questions simply
- Be clear and specific – make it very clear what you actually need funding for
- Provide a detailed breakdown of costs if asking for help with more than one thing
- If asking for help with salaries, provide an up-to-date job description and factor in 'on costs', RPI
- Think about how you're going to measure success - will ask you to do this as part of reporting
- Be upfront about challenges facing the charity or any areas where you do not have expected processes, governance or policies in place
- Describe how you collaborate with other charities or organisations which carry out similar work
- Be realistic about future funding opportunities / sustainability
- Think about outcomes, not just outputs
- Explain how 'lived experience' affects your work



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DOS AND DON'TS

DON'T

- Waffle or repeat yourself
- Lapse into business-speak
- Be imprecise about how much you need
- Be opaque about where else you have applied for funding
- Be vague on your reserves – if you have high reserves we need to understand what these are for
- Apply for your own salary – a board member must do so
- Overpromise (likelihood of other funding, future plans, grants from the States etc)
- Exaggerate impact – or be too modest



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YOU'VE SUBMITTED YOUR APPLICATION — WHAT NEXT?

Your application will be acknowledged, and you will be advised when it is likely to be considered by a Grants Panel or Board

More information might be requested via email

Lloyds might request to arrange a site visit

SIF might request a meeting with the board

The Foundation might ask you to present to its Grants Panel who meet approx. 3 times a year and make recommendations to their board who have the ultimate decision

You will be contacted with the decision on your application

If application is successful you will be asked to report on outcomes identified in application



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Q&A



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WORKSHOP /
EXERCISE

INTRODUCTION TO OBA & REPORTING EXERCISE



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WHY OUTCOME REPORTING IS IMPORTANT IN SUPPORTING GRANT APPLICATIONS

- Having a clear plan for your organisation – what is our purpose, why do we exist – how well is this conveyed?
- What data do we have as an organisation – are we able to demonstrate:
 - The need we are addressing
 - The amount we have delivered
 - The impact the service has had
 - Trends that have influenced our decision-making
- How well do we seek client feedback – how do we measure this?
- How do we collaborate with other charities and organisations – are there synergies that would allow us provide even more?



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OBA – an overview

Outcomes-Based Accountability® or OBA is a disciplined way of thinking and taking action that can help organisations to improve the lives of those they support and the community as a whole. (It is also known as Results-Based Accountability in some parts of the world).

It focuses around

- Identifying the tangible benefits that an organisation's activities can have on their target group and the community as a whole
- Using data to demonstrate performance
- Answering the question “Is anyone better off”
- Be able to convince others of the return on their investment – improve your chances of success with grant applications



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OBA Core Principles

- Planning activities to get the best results ... enabling monitoring
- Accountability
- Indicators and Measures
- Baselines and “turning the curve”
- Performance measures



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Indicators and Measures

- Indicators

- How we measure progress against chosen outcomes

- Measures

- A measure of how well a service or programme is performing ie customer feedback:
 - How much did we do
 - How well did we do it?
 - Is anybody better off?



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PERFORMANCE - WHAT WE NEED TO CONSIDER

How do I tell the story of my service?

How can I evidence the difference we make for our customers?

How can I use OBA as a tool to help?

How do I evidence our contribution to the bigger picture?

Does it work in real life?



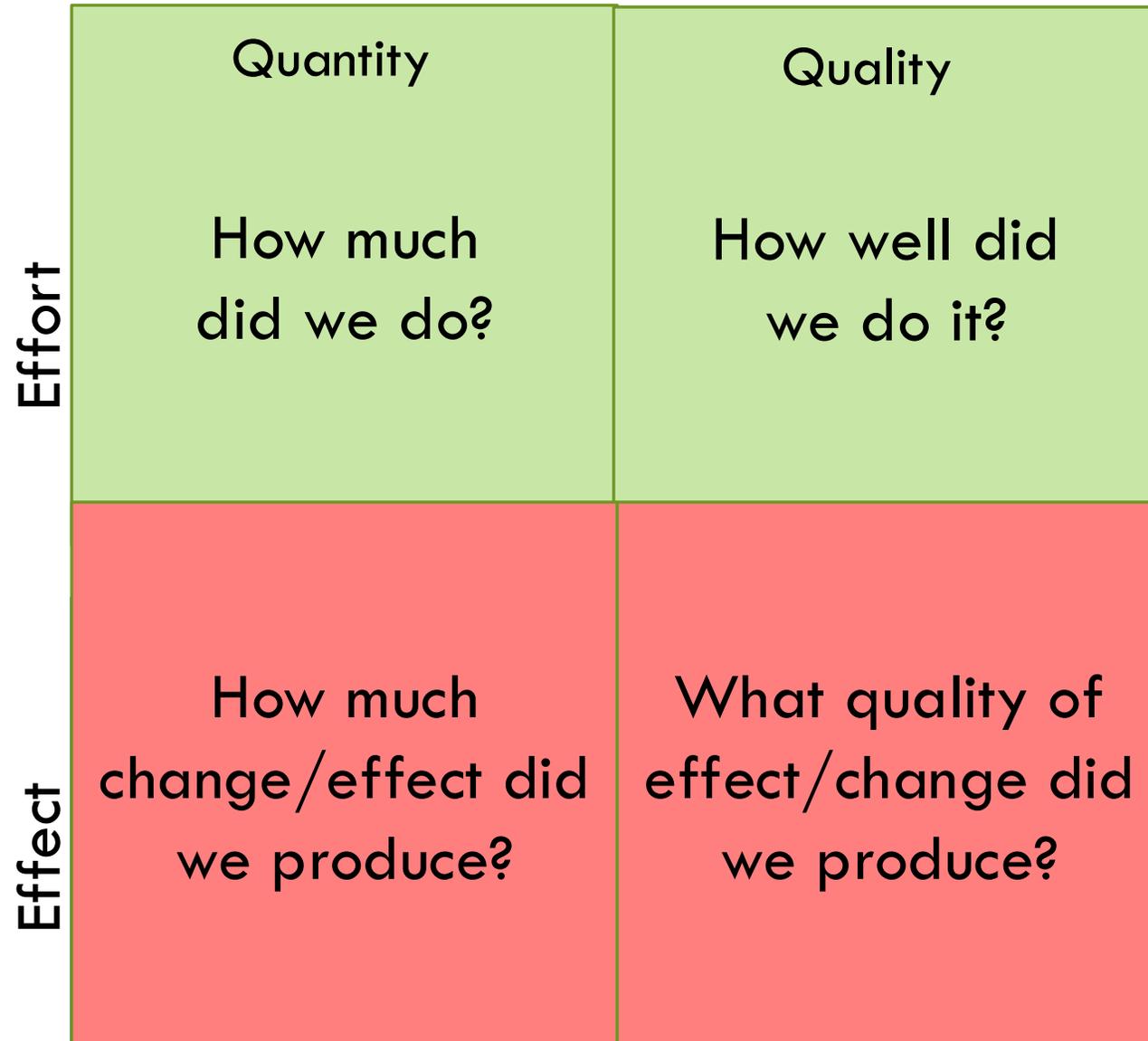
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Performance Measures – The OBA “Quadrant”

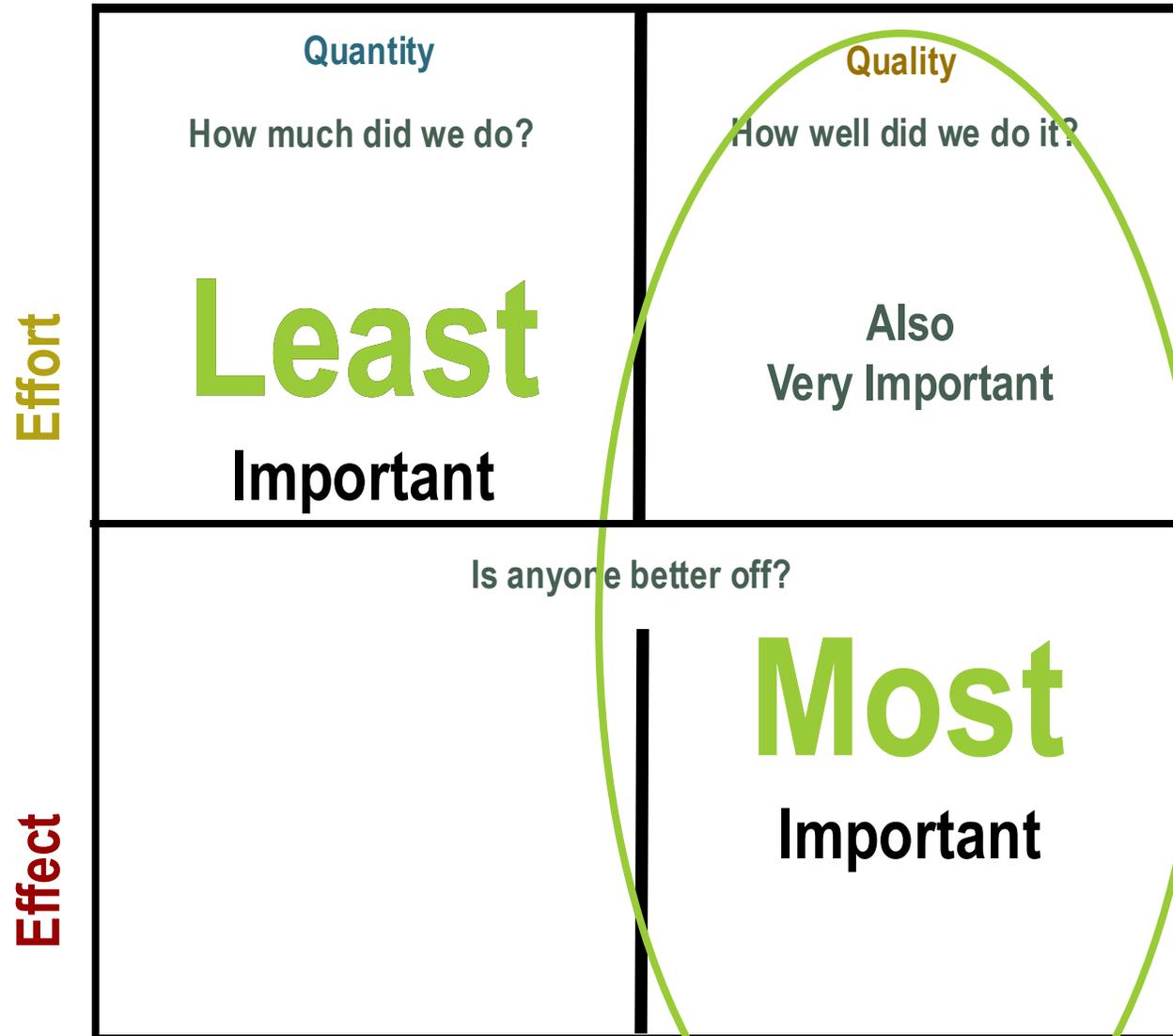


Do people really want to know how busy you are, or do they want to know what you are actually achieving for them?

This raises another fundamental question – How do we know we are doing the right things if we are not measuring impact?



Not all performance measures are created equal



Performance Measures for my ...

<p><u>How much did we do?</u></p>	<p><u>How well did we do it?</u></p>
<p><u>Is anyone better off?</u></p>	



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