



**Scottish Disability  
Sport**

# Scottish Disability Sport Fundraising through Trusts Workshop

16 September 2018

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Leading inclusive sport in Scotland for  
participants and athletes with physical,  
sensory or learning disabilities



# Introduction

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- Fundraising has many methods, the main ones being community/events fundraising; individual donor giving; and trusts and other grant giving bodies
- This presentation focuses on the latter, e.g. Trusts and other grant giving bodies
- Key is approaching the 'right people at the right time in the right way for the right reasons'

# Key Outcomes

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## **By the end of the workshop you will have**

- Gained a better understanding of Trust fundraising in UK
- A better understanding how disability sport fits within this landscape
- A greater understanding of the key principles of making Trust applications
- Gained awareness of some of the tools and support available
- More information to base your decision as to whether Trust fundraising is appropriate to you
- Gained greater confidence to apply to Trusts



# Trusts: Facts and Figures

- About 8,800 grant-making trusts and foundations in the UK!
- Largest 2,500 trusts alone contribute £3bn to charitable causes
- Largest 150 trusts account for £2.6bn (85%) of the £3bn
- Figures equate well with support provided by central and local government thus making the income from trusts crucial to the charitable sector's growth
- Success in 1 out of 4 applications is pretty good going!

# Background

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- Sport in itself is not necessarily high up the list in terms of main subject areas supported, but health and wellbeing and education are
- Furthermore, one of the 'main beneficiary areas' are people with disabilities
- Scotland, per capita, does quite well, but not quite as well as England
- Fact that most SDS branches are registered charities gives a distinct edge over other sporting 'district associations' as many trusts will only support registered charities

# Background cont.

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- Public sector cuts likely, therefore good time to consider trusts
- Level of support from trusts is static, just more applications
- Trusts have a greater degree of independence, therefore can be flexible and creative
- Trusts can fund both capital and revenue projects

# How to Search

- As already referred to, there are around 8,800 trusts in the UK, so clearly a method of reducing this number to manageable proportions is required
- The start point is to determine what the desired outcome is, i.e. to prioritise appropriate trusts, and then work out how to achieve that outcome
- The most recognised search tool is <http://www.trustfunding.org.uk/> (subscription from £378 per annum)



# How to Search contd.

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- They specialise in information and advice about charitable trusts and foundations that fund in the UK
- These search tools involve inputting some basic information, including level of award required, and using keywords, e.g. Disability; Sport and Recreation; Sport Education; Scotland
- There may be a degree of a 'manual refining' process of reading each entry to eliminate the least likely sources





- Ability to demonstrate need
- Outputs and outcomes
- ‘Full cost recovery’
- Use ‘stories’

Further information provided on Handouts 1+2

# Demonstrating Need

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- The starting point for any project is to be clear on the needs it is addressing
- Need is the term used to describe a problem or issue, or situation where something needs to change to make things better, for a person, a group of people, an environment or an organisation

# Demonstrating Need contd.

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Ask yourself these questions:

- What is the problem or issue you want to address with your project?
- What evidence is there that this need exists?
- What are the reasons for the need?
- Have you carried out any research?
- Why have you prioritised this need?
- Why is your project an appropriate response to the need?
- Have you consulted with the people your project will benefit and other relevant stakeholders?
- Do you know about relevant local strategies or initiatives, or other projects working in this field and how your project will fit in?

# Outputs vs. Outcomes

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- The outcomes are the specific changes that result from your project
- Use words of change (for example: 'more', 'better', 'less', 'improved') to describe your outcomes, to say what will be different by the end of the project?
- Do your outcomes link logically to the need you have identified?
- Are your outcomes short and clear?
- Have you limited your outcomes to a manageable number?

# Outputs vs. Outcomes contd.

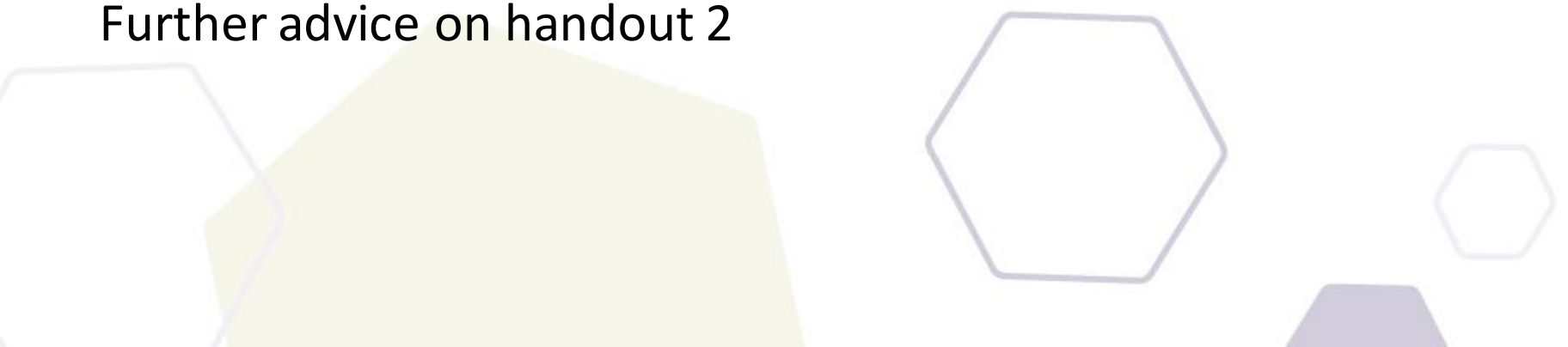
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- The activities or services that you provide are called outputs – the things you deliver
- You may have a programme of activities that you have run for many years
- Or you may have developed new activities to fit in with what local people want
- In both cases, activities are what help you to fulfil your overall aim
- If you're not sure whether you're looking at an outcome or an output, ask yourself 'so what?'

# Full Cost Recovery

- The term 'full cost recovery' means securing funding for – or recovering – all your organisation's costs, including the direct costs of your projects and all your overheads
- In full cost recovery your organisation's overheads are shared among your organisation's different projects
- The full costs of your project are all the costs directly relating to the project plus the project's share of the overheads

Further advice on handout 2



# Fundraising Cycle

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- Research – application – evaluation – reporting
- It is worth pointing out again that successful applications will require a degree of time, effort and expertise spent on reporting, monitoring, evaluating, reviewing, in addition to, in some cases, actually meeting with personnel from the ‘funding agency’



- Whilst making an application is time consuming in itself, careful consideration also needs to be given to both reporting and evaluation, which are clearly linked.
- Reporting – different trusts will have different reporting requirements and it is important to allow time for this and provide what is requested
- This is also crucial in developing a relationship with the funder in order to obtain year-on-year funding where criteria allow this

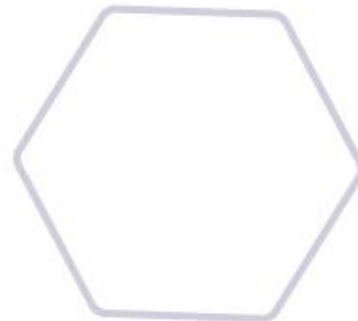


- Evaluation – equally important is the need to demonstrate value to any funder, none more so than in the current climate.
- How you will show the change your project is achieving over time?

There are two key steps to this process:

- Understanding and identifying the signs of change (using indicators)
- Measuring the extent of change that is happening

See handout 3



# Generic Checklist

- If several/annual applications are intended to be made, it would be time well spent now ensuring such information is 'packaged' and readily available as and when required
- The following checklist is not exhaustive, nor is every item required for every application
- Different items may be required at different stages of application, depending on progress

Further information provided on the Checklist Handout 4

# Accompanying Document Checklist

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- Most recent audited/certified annual accounts
- Most recent annual report
- Memorandum and Articles (in some cases)
- Budget for the proposed project
- Budget for organisation as a whole (in some cases)
- Job Description (if salary costs requested)
- Admin/contact details of your organisation

# Accompanying Document Checklist cont.

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- Summary of purpose/info/past successes, including list of Board members
- Project description
- Business Plan (in some cases)
- Evidence of certain policies, e.g. Child Protection
- Independent Referee, or 2 (in some cases)
- Cover letter on headed paper (in some cases)

# Possible Opportunities

- Geographical bias of Trusts
- Partnership Applications
- 'Cold Spots', e.g. 'Children in Need' ... BBC Children in Need has identified geographical 'cold spots' which can be described as a letter 'S', lying on its side. The top of the 'S' is in Fife, moving through Falkirk, North Lanarkshire, East Ayrshire, North Ayrshire up to Paisley.
- Eligibility, registered Charities in particular

See handout 5

- Not rocket science, but can be time consuming
- Competitive 'market' in current climate
- Must demonstrate need and clear outcomes
- Disability sport is a 'good fit' to criteria of many Trusts
- There are clear opportunities, both individually and collectively

# Workshop Task

- Refer to handout entitled workshop task
- Based on the structure provided, create a funding proposal for a 'real' project
- 15 minutes in groups
- 5 minutes total for all to feedback, summarising their proposal

- Digest information
- Discuss in planning context within branch/organisation
- Is there a need within branch/organisation?
- Delegate individual to co-ordinate
- Seek/use support as necessary

See handout 6

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- Has this been useful?
- What else would you like to know?
- Is it likely you will 'action'?
- What support do you anticipate needing?
- Your questions??

THANK YOU!

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