



**FUNDRAISING FOR PARTNERSHIP ACTIVITIES**

the  
wheel

Stronger Charities.  
Stronger Communities.



HELLO WE ARE...  
**THE WHEEL**

## LET US INTRODUCE OURSELVES...

- We are Ireland's national association of **community, voluntary and charitable organisations**
- We **represent** and **support** these organisations to help make Ireland a more **fair** and **just** place for all.





# OUR 1,600 MEMBERS INCLUDE...

The Wheel's members employ an estimated 35,971 FTEs, 22% of the sectors workforce and a turnover of €1.95billion, 14% of the sectors estimated €13.8billion turnover.

Large national charities,  
umbrella bodies and  
branch organisations

(our 21 largest members  
have a combined turnover  
of €1.08billion)

Medium-sized  
charities and  
voluntary  
organisations

Small  
volunteer-run  
groups

(our SMALLEST 400  
members have a  
combined turnover  
of LESS THAN  
€16million)

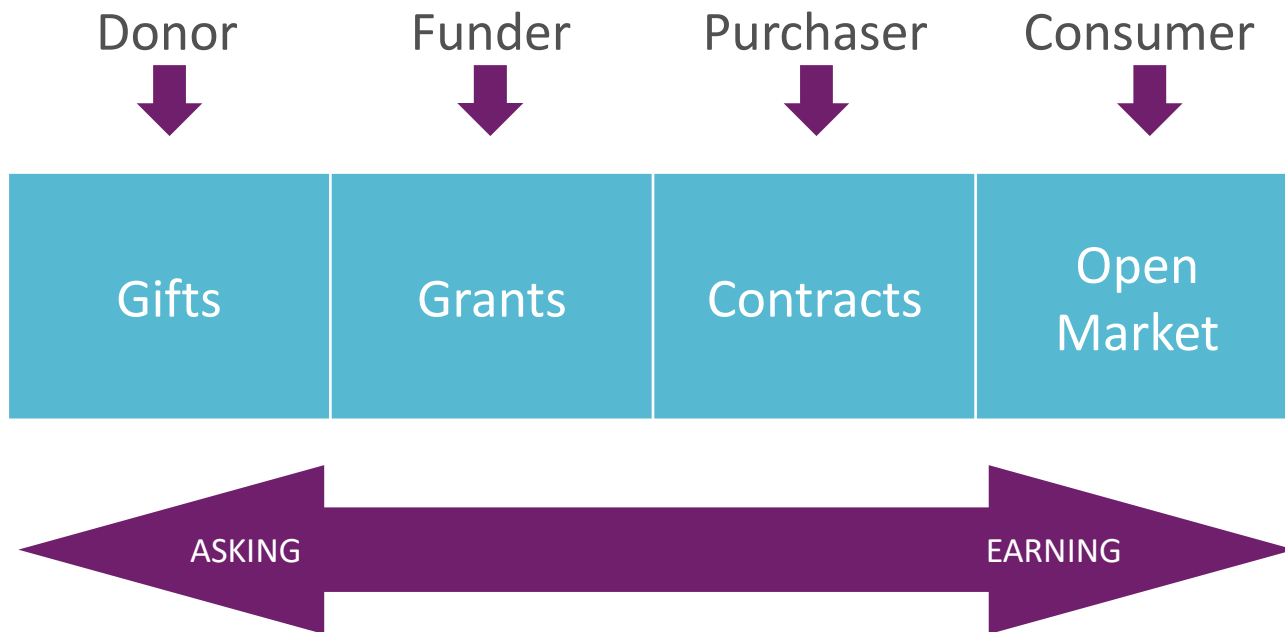
Most organisations fall in these categories



Stronger Charities.  
Stronger Communities.

## SOURCES OF FUNDING

# GENERAL SOURCES OF FUNDING



*Courtesy NCVO Sustainable Funding Project*



Stronger Charities.  
Stronger Communities.

## FUNDING OPTIONS

Start local & fan out to national  
opportunities

CampusEngage



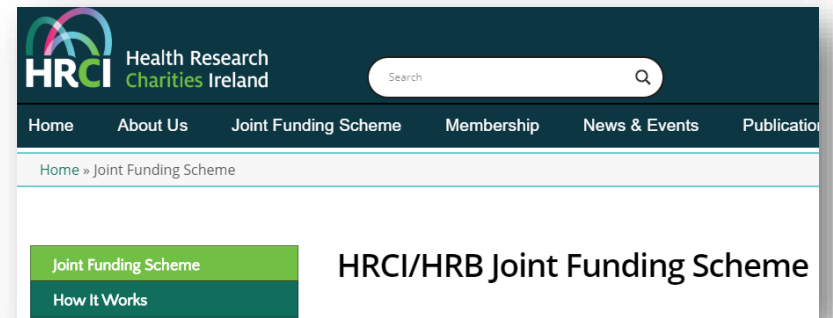
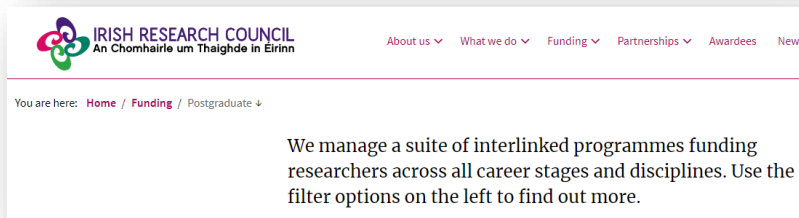
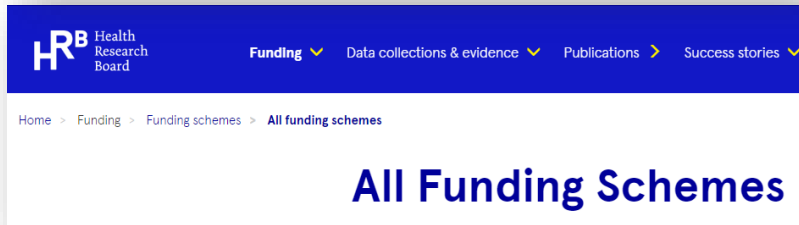
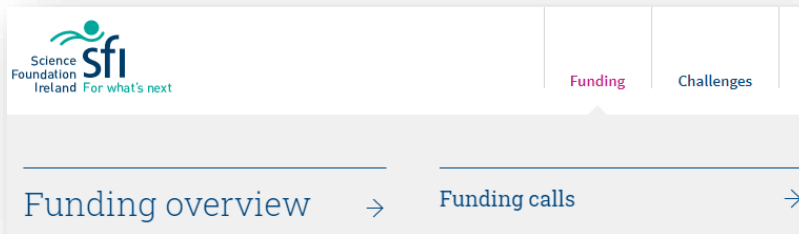
Chief Scientific Adviser  
to the Government of Ireland

# IRELAND'S RESEARCH AND DEVELOPMENT FUNDERS

[www.knowledgetransferireland.com/Reports-Publications/Ireland-s-Research-and-Development-Funders.pdf](http://www.knowledgetransferireland.com/Reports-Publications/Ireland-s-Research-and-Development-Funders.pdf)



# SOME POTENTIAL FUNDING PARTNERS



# SOCIAL INNOVATION FUND

Sustaining great ideas



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[OUR SUPPORTERS](#)

[OUR FUNDS](#) ▲

[CHILDREN AND YOUTH EDUCATION  
FUND](#)

[CHILDREN AND YOUTH MENTAL  
HEALTH FUND](#)

[IGNITE FUND](#)

[MNÁ NA HÉIREANN, WOMEN OF  
IRELAND FUND](#)

[ENGAGE & EDUCATE FUND 2019](#)

[GROWTH FUND](#)

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[RESILIENT COMMUNITIES FUND](#)

[SOCIAL ENTERPRISE DEVELOPMENT  
FUND 2018](#)

[ENGAGE & EDUCATE 2018](#)

[YOUTH EDUCATION FUND](#)

## [OUR FUNDS](#)

Since our first year of operations in 2015, we've opened 14 issue-specific funds to best cater for as many social innovations as possible. We've partnered with companies such as Bank of America, Google, Medtronic, Mason Hayes & Curran and IPB Insurance, as well as SME's, trusts, families and individuals and provided growth capital and supports to 61 social innovations in Ireland.



# EUROPEAN FUNDING

[Getting Started with EU Funding](#) [Characteristics of EU Funding](#) [Tips On Winning EU Funding Proposals](#)

[Home](#) • [Funding](#) • [Fundraising Advice & Guidance](#) • [European Funding](#) • [European Funding Opportunities](#)

## EUROPEAN FUNDING OPPORTUNITIES

Do you want a quick and easy overview of the types of EU funding available to the Irish community, voluntary, charity and social enterprise sector? Look no further!

Below is a brief overview of eligible European programmes, divided into ten themes. When looking at these categories, ask yourself: What is the aim of the project? Is it about educating people and spreading awareness? Check out the Education, Training, Youth and Sport category.

Is your project about the rights of older people? Check out the Human Rights category. If in doubt, you can [contact the European Programmes Team](#) at The Wheel for more advice.

Remember, if you decide that one or more of these funding opportunities has potential for your organisation, the best way to get started is to read [Accession EU Funds - 2013 and Beyond](#) by Professor Hugh Quigley, follow our 5 steps for [Getting Started with EU Funding](#), and subscribe to [Fundingpoint](#) to be kept updated about not only European funding, but an additional 600+ other grants available to our sector. Discounts for the exclusive Fundingpoint Subscribers Newsletter are available to [members of The Wheel](#).

## International development aid

The EU is the largest donor of development aid in the world as well as the biggest contributor of climate finance. It takes various political actions to reduce poverty and offers grants to developing countries.



Deirdre Finlay - European Programmes Manager

## Funding from €5000 - €150,000

There are four different types of project you can apply for under Europe for Citizens. Deadlines open at different times, depending on the type of project.

Click on each project type below to find out more about it and visit our page on [Project Examples](#) for inspiration.

### 1. European Remembrance Projects - Up to €100,000

Projects funded under this strand will invite reflection on European history and on common values. For example, you can do a project commemorating date in history or reflecting on the causes of totalitarian regimes in Europe's modern history. The strand often appeals to cultural organisations or historical groups.

Preference will be given to projects which encourage tolerance, mutual understanding, intercultural dialogue and reconciliation.

### 2. Civil Society Project - Up to €150,000

This measure supports 'transnational' projects (lots of partners around Europe) that are organised by groups that are expert at directly involving citizens. Projects gather citizens from different territories on activities directly linked to Union policies, with a view to giving them an opportunity to participate in the policy-making process of the EU.

### 3. Twinning Projects - Up to €25,000

What do you think when you think about Town Twinning? You probably picture signs on the outskirts of towns and formal agreements between municipalities all over Europe. But, did you know, that community and cultural organisations in Ireland can also engage in short-term town twinning projects? Grants contribute towards the costs of individuals to travel to a different European town to take part in events that focus on concrete issues from the European agenda.

### 4. Network of Towns Projects - Up to €150,000

Local authorities and nonprofits working together across Europe may wish to develop networks of towns to make their cooperation more sustainable. Networks of Towns are a strong link that bind municipalities. Networks created by a series of town twinning links should be used for developing thematic and long-lasting cooperation between towns.

[www.europeforcitizens.ie/funding-available.html](http://www.europeforcitizens.ie/funding-available.html)



[Home](#) > [Programmes](#) > [Erasmus+](#) > [VET](#) > **About**

[< View all programmes](#)

Erasmus+

By Key Action





- Allocating circa €615 million to local and national community organisations in 2017 across 23 programmes
- Social Inclusion and Equality,
- Inclusive Employment and Enterprise
- Early Years and Young People.
- On behalf of:
  - Department of Rural and Community Development,
  - Department of Children and Youth Affairs,
  - Department of Employment Affairs and Social Protection, as well as the
  - Department of Health/HSE
  - a number of EU bodies.



Access and Inclusion  
Fund (AIM)



Better Start



Comhairle na nÓg  
Development Fund



Community Services  
Programme (CSP)



County/City Childcare  
Committees (CCC)



Dormant Accounts Fund  
(DAF)



## €8,000- €10,000 for health partnerships

[Home](#)[Updates ▾](#)[Partnerships ▾](#)[ESTHER Ireland Grants ▾](#)

### ESTHER Ireland Grants

The 2019 ESTHER Ireland Small Grants Scheme is now accepting applications.

#### Background

The European ESTHER Alliance engages health institutions in effective and sustainable North-South partnerships, strengthening the capacity of health institutions to provide quality services through **knowledge generation, sharing best practice, collaboration, and advocacy.**

The ESTHER Alliance aims to contribute to the achievement of healthy lives and well being for all, at all ages. ESTHER Alliance supports peer-to-peer partnerships that are capable of inspiring institutions and individuals to change the way they work, improve the quality of service delivery and potentially influence health policy.



# WHAT'S OUT THERE

- There 851 opportunities that we know of
- Not all will be available to you
- Find out the ones that are
- Research and apply for them
- Access is available through The Wheel's Fundingpoint Service

## Status

[Closed \(651\)](#)

[Open \(200\)](#)

[Archived \(17\)](#)

[Suspended \(3\)](#)

## Source

[Local Government \(180\)](#)

[Statutory \(172\)](#)

[Trust / Foundation \(113\)](#)

[Corporate \(100\)](#)

[Foundation \(63\)](#)

[European Union \(62\)](#)

[Central Government \(58\)](#)

[Local Authority \(39\)](#)

[Nonprofit \(25\)](#)

[International \(7\)](#)

[Trust \(5\)](#)

[Independent Trust \(4\)](#)

## SUBSCRIBE TO FUNDINGPOINT



Fundingpoint is The Wheel's online database of funding grants for the Irish community and voluntary sector.

800+

HUNDREDS OF FUNDING GRANTS

X 12

DOZENS OF FUNDING DEADLINES

1

EXCLUSIVE MONTHLY NEWSLETTER

# WHAT'S OUT THERE

This is what 160 of 330 funders looks like

The Arts Council (47)  
South Dublin County Council (30)  
Community Foundation for Ireland (23)  
Pobal (23)  
Social Innovation Fund Ireland (15)  
Kildare County Council (12)  
Family Support Agency (11)  
Clare County Council (10)  
Dún Laoghaire-Rathdown County Council (10)  
Galway County Council (10)  
Leargas (10)  
Westmeath County Council (10)  
Cork City Council (9)  
Meath County Council (9)  
Special European Union Programmes Body (9)  
Department of Foreign Affairs and Trade (8)  
Kilkenny County Council (8)  
Laois County Council (8)  
Mayo County Council (8)

Department of Children and Youth Affairs (7)  
Dublin City Council (7)  
Irish Aid (7)  
European Commission DG Education and Culture (6)  
Fingal County Council (6)  
Limerick County Council (6)  
North Tipperary County Council (6)  
Roscommon County Council (6)  
Department of Arts, Heritage and the Gaeltacht (5)  
Department of Justice and Equality (5)  
Foras na Gaeilge (5)  
Galway City Council (5)  
Irish Youth Foundation (IYF) (5)  
National Association for Youth Drama (5)  
Offaly County Council (5)  
Sligo County Council (5)  
The Department of Rural and Community Development (5)  
Údarás na Gaeltachta (5)  
Combat Poverty Agency (4)  
Cork County Council (4)

European Commission Employment, Social Affairs & Inclusion (4)  
European Youth Foundation (EYF) (4)  
HSE (4)  
International Fund for Ireland (4)  
Irish Human Rights and Equality Commission (4)  
Leitrim County Council (4)  
Mid-West Regional Drugs & Alcohol Forum (MWRDAF) (4)  
Music Network (4)  
South Western Regional Drugs Task Force (4)  
Waterford County Council (4)  
Wexford County Council (4)  
Carlow County Council (3)  
Cavan County Council (3)  
Department of the Taoiseach (3)  
Diageo Ireland (3)  
East Coast Regional Drugs Task Force (3)  
European Commission DG Justice and Home Affairs (3)  
European Commission Information Society & Media DG (3)  
Longford County Council (3)  
Midland Regional Drug Task Force (3)

Monaghan County Council (3)  
St Stephen's Green Trust (3)  
The Wheel (3)  
Ulster Bank Group (3)  
Waterford City Council (3)  
Western Region Drugs Task Force (3)  
Wicklow County Council (3)  
A.J. Muste Memorial Institute (2)  
Anna Lindh Foundation (2)  
Ballymun Regional Youth Resource (2)  
Bank of Ireland (2)  
Bord Gáis Energy (2)  
BT Ireland (2)  
Carnegie UK Trust (2)  
Changemakers (2)  
City of Galway Vocational Education Committee (2)  
Clann Credo - The Social Investment Fund (2)  
Co-operation Ireland (2)  
Coca-Cola Ireland (2)  
Colmcille (2)

Department of Agriculture, Food and the Marine (2)  
Department of Communications, Climate Action & Environment (2)  
Department of Education and Science (2)  
Department of Health (2)  
Department of Transport, Tourism and Sport (2)  
Donegal County Council (2)  
EC Employment, Social Affairs and Inclusion (2)  
Education, Audiovisual, & Culture Executive Agency (2)  
Environmental Protection Agency (2)  
Fáilte Ireland (2)  
Global Health Council (2)  
Google (2)  
Irish Hospice Foundation (2)  
Katherine Howard Foundation (2)  
Kingfisher Group (2)  
Mayo Local Sports Partnership (2)  
Meath Local Sports Partnership (2)  
North Dublin City and County Regional Drugs Task Force (2)  
North West Regional Drug & Alcohol Task Force (2)

O2 (2)  
Tallaght Drugs Task Force (2)  
The Fermanagh Trust (2)  
The Ireland Funds (2)  
Tolka Area Partnership (2)  
Trócaire (2)  
Vodafone Ireland Foundation (2)  
Westmeath VEC (2)  
Youth Service America (2)  
3M United Kingdom PLC (1)  
Abbott Ireland (1)  
Accenture (1)  
Age and Opportunity (1)  
Airticity (1)  
Alcan Incorporated (1)  
Alcoa Foundation (1)  
Allied Irish Banks Plc (1)  
All Ireland Institute of Hospice and Palliative Care (1)  
Amgen Foundation (1)

Amgen Foundation (1)  
Andrew W Mellon Foundation (1)  
Artlinks (1)  
Arts & Disability Forum (1)  
Aviva Stadium (1)  
Bayer (1)  
BeLonG To (1)  
Ben & Jerrys Irish Pad (1)  
Bernard Sunley Charitable Foundation (1)  
Bewleys (1)  
Blanchardstown Area Partnership (1)  
Blanchardstown LDTF (1)  
Boardmatch Ireland (1)  
Border Action (1)  
British Toy and Hobby Association (1)  
Broadcasting Authority of Ireland (BAI) (1)  
Building and Social Housing Foundation (1)  
Cadbury Trust (William Adlington) (1)  
Calor (1)  
Calouste Gulbenkian Foundation (1)

## KEY TAKE AWAYS

1. There's more out there than you might first realise
2. The Wheel has a database of research already done
3. Start local, spread regional & national



Stronger Charities.  
Stronger Communities.

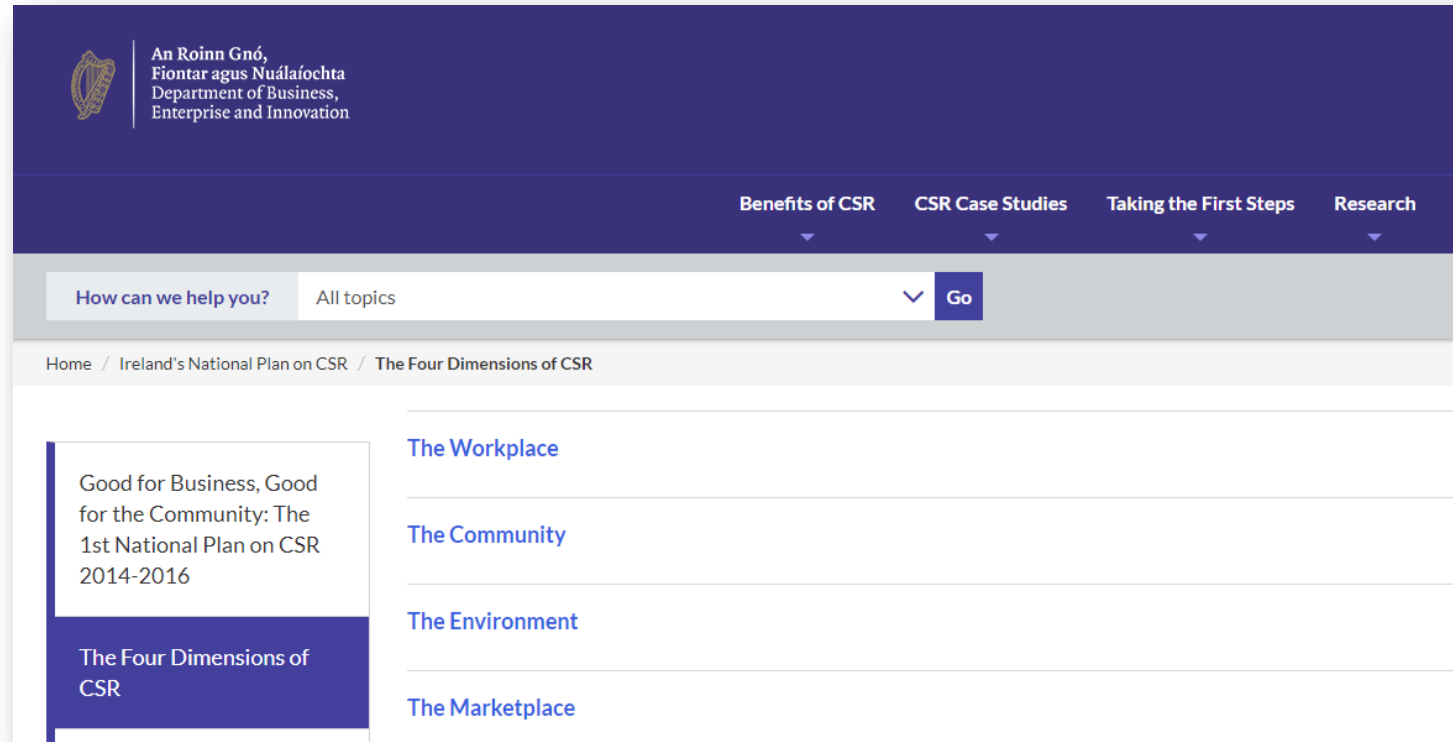
## PARTNERING WITH CORPORATES

The following slides are some  
example of CSR programmes  
available

(this is by no means an exhaustive list  
but for illustrative purposes only)



# WWW.CSRHUB.IE



# WHO ARE INVOLVED AND TAKING AN INTEREST IN THE SDGs?

## The Sustainable Development Goals

The 2030 Agenda for Sustainable Development encourages countries to develop national responses to the Sustainable Development Goals (SDGs) and incorporate them into planning and policy. The Minister for Communications, Climate Action and Environment has lead responsibility for promoting and overseeing national implementation of the 2030 Agenda for Sustainable Development and its 17 SDGs. This is a whole-of-government initiative where all Ministers retain responsibility for implementing the individual SDGs relating to their functions.

This Department has been assigned responsibility for preparing the first SDG National Implementation Plan and the Voluntary National Review (VNR). The first National Implementation Plan was published in early 2018. The Plan sets out arrangements for interdepartmental coordination, stakeholder engagement and periodic progress reporting at national and global levels.

Ireland's first VNR was submitted to the UN in June 2018, and formally presented to the High-level Political Forum at the UN Headquarters in New York in July 2018.

Learn more about the SDGs and Ireland's response and commitment to the UN below.

### Background to the SDGs



▶ [More information on the SDGs](#)

### SDG Champions 2019




▶ [SDG Champions 2019](#)

### SDG Stakeholder Forum



▶ [Read more about the Stakeholder Forum](#)



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EN GB

### Our Sustainability Strategy

Our Sustainability Strategy is a Company-wide plan to address and strengthen our performance around relevant key environmental, social and governance issues. The strategy builds on our previous efforts and provides a clear road map to guide our sustainability work over the next four years (2019-2022).

We have aligned our Sustainability Strategy with the relevant United Nations Sustainable Development Goals (SDG), which serve as a universal call to action to end poverty, protect the planet and ensure that all people enjoy peace and prosperity.

At the heart of our Sustainability Strategy are three focus areas: *Innovation and the Circular Economy; Environmental Stewardship; and People, Safety and Communities.*

**1.**  
**Innovation & Circular Economy**  
Working closely with our customers and raw material suppliers, we will continue to deliver innovative and circular packaging solutions.

**2.**  
**Environmental Stewardship**  
We will fulfil our customers' needs while driving down emissions and potential impacts on climate change.

**3.**  
**People, Safety and Communities**  
We will further invest in protecting our people, developing future talent, and enabling greater engagement with our surrounding communities.

## Sustainability at AIB

We pledge to **DO MORE.**




## Community Engagement

Committed to protecting our Members and their communities, we have made funding available to grassroots groups and organisations that are at heart of every community. Since 2012 we have supported over 500 projects nationwide by investing over €10 million back to communities across Ireland. We believe in empowering local people to create lasting change in their communities and to support the continuation of volunteerism and local community support.

# Coca-Cola Thank You Fund

## Coca-Cola Thank You Fund FAQs

By: Journey Staff

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SHARE:



### What is The Coca-Cola Thank You Fund?

Now in its eighth year, the **Coca-Cola Thank You Fund** was set up in 2011 to mark the 125<sup>th</sup> anniversary of the company.

Over the years, the Coca-Cola Thank You Fund has supported projects including community, social and education programmes aimed at youth, healthy and active lifestyles, and environmental leadership. To date €855,000 has been given to 70 non-profit organisations across the island of Ireland.

In 2018, Coca-Cola will donate €100,000. The theme of the Fund will focus on working with communities in Ireland and Northern Ireland to inspire and support young people.

In 2018, the Fund wants to support non-profit organisations with new ideas aimed at bridging the divide between education and the workplace, fostering diversity and inclusion, empowering young people to become the leaders of the future and supporting youths taking an innovative approach to sustainability in local communities.

### RELATED STORIES



#### How To Apply To The Coca-Cola Thank You Fund

**Journey Staff**  
**Thank You Fund 2018:** €100K available for community projects that inspire and support young people





Ireland (EN) ▾



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## About us

What we do

How we do it

Policies, codes and standards

GSK in Ireland

### Partnerships

Barretstown

Charity of the Year

Community Investment Fund

Our Work with Patient Organisations

Academic Collaborations

GSK Ireland IMPACT Awards

Benefits of a community-based approach to healthcare

A badge of honour which we will wear with pride

Wheelie Good Cause 2018

Making a difference awards

Home > About us > Partnerships > GSK Ireland IMPACT Awards



## GSK Ireland IMPACT Awards

Each of the winning charities receive...

**€10,000**

in unrestricted funding - with €2,000 for each of our runners up.



## BUT WHERE DO PEOPLE WORK?

- Everyone thinks of banks, supermarkets & consumer brands
- Think outside the box; Not just the high street
- Where does everyone you know work? What companies are they working for?
- Draw up a list of every company where everyone on your fundraising committee knows someone working there. How many businesses could that be?
- Now ask each contact to propose your organisation as a charity/community group that company can partner with



**Opportunity Here & Here**



## KEY TAKE AWAYS

- Find businesses close or local to the community
- Try to get a friend/family member to introduce you to where they work
- Get staff fundraising for you



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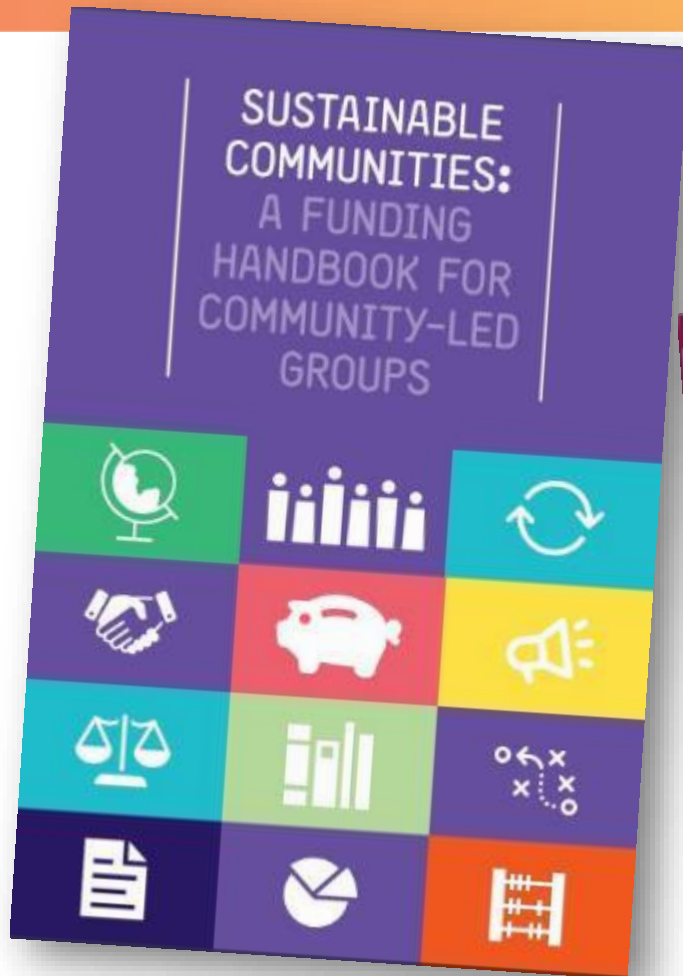
## RESOURCES

Hugh O'Reilly  
Director of Business Development  
The Wheel  
[hugh@wheel.ie](mailto:hugh@wheel.ie)  
01 454 8727

# RESOURCES

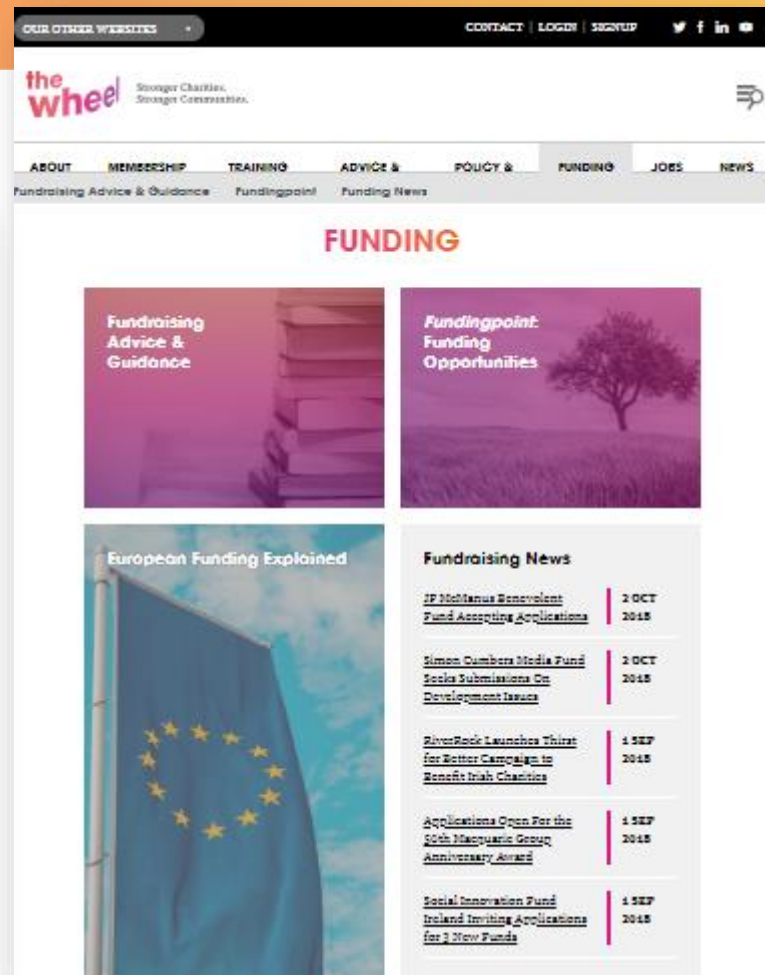
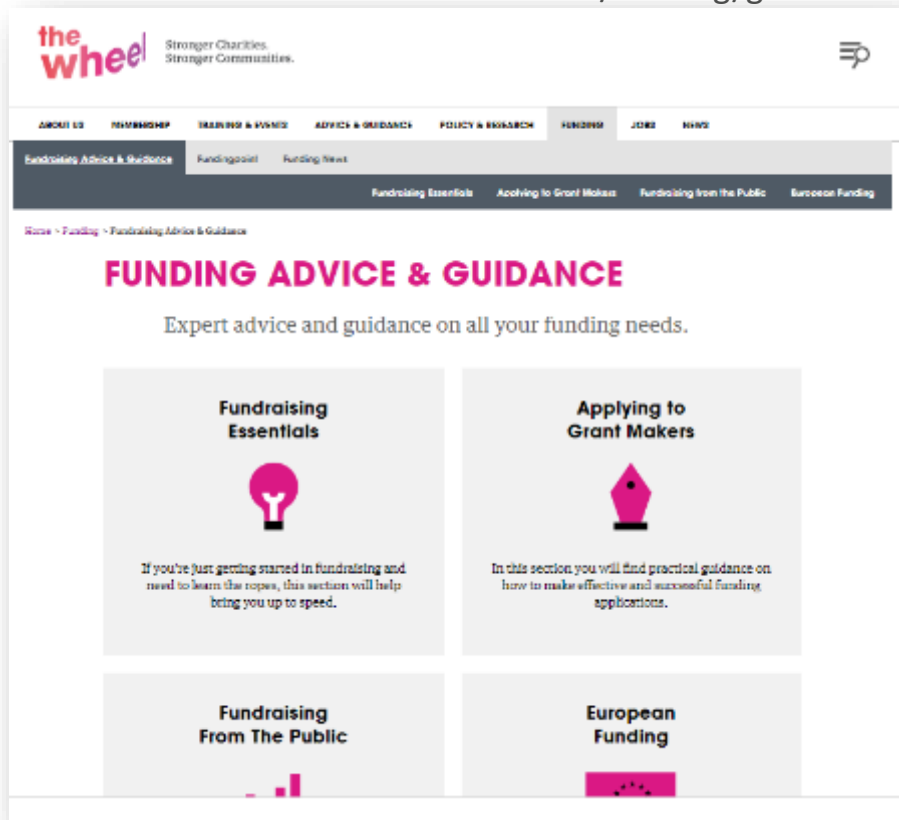
## Free to download

[www.wheel.ie/about-us/publications#funding](http://www.wheel.ie/about-us/publications#funding)



# RESOURCES

www.wheel.ie/funding/guidance





# RESOURCES



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[ADVICE & GUIDANCE](#)

[POLICY & RESEARCH](#)

[FUNDING](#)

[JOBS](#)

[NEWS](#)

[Analysing Your Fundraising Capacity](#)

[Charities Regulator's Fundraising Guidelines](#)

[Setting Realistic Fundraising Targets](#)

[Engaging Your Board in Fundraising](#)

[Home](#) > [Funding](#) > [Fundraising Advice & Guidance](#) > [Essentials of Fundraising](#) > [Charities Regulator's Fundraising Guidelines](#)

## CHARITIES REGULATOR'S FUNDRAISING GUIDELINES

On 28 September 2017, the Charities Regulator published a comprehensive set of fundraising guidelines for charities, which aim to enable trustees to protect their charities' reputations and boost public trust and confidence in their organisations.



Guidelines for Charitable  
Organisations on Fundraising  
from the Public



# RESOURCES

## SixSteps to "Guidelines" Compliance

Step 1: Board Resolution

Step 2: Responsibility

Step 3: Developing  
Documents

Step 4: Training

Step 5: Uploading  
Documents

Step 6: Annual Reporting  
on Compliance

Cii Resource Materials



## Implementation Resource Materials

Guidelines for Charitable Organisations on Fundraising from the Public

Six Steps to Compliance

Trustee Resolution

Cii Checklist

Public Compliance Statement

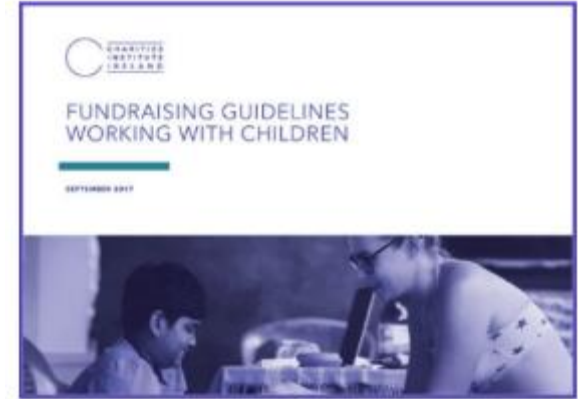
Donor Charter Template

Handling Feedback & Complaints procedure

Codes for Best Practice for Fundraising

# RESOURCES

[www.charitiesinstituteireland.ie/the-cii-codes](http://www.charitiesinstituteireland.ie/the-cii-codes)



Fundraising Guidelines: Working with Children



Fundraising Guidelines: Cash Collections



Fundraising Guidelines: Charity Shops



Fundraising Guidelines: Direct Recruitment



## FUNDRAISING GUIDELINES DIGITAL FUNDRAISING

SEPTEMBER 2017



Fundraising Guidelines: Digital Fundraising



## FUNDRAISING GUIDELINES EVENTS

SEPTEMBER 2017



Fundraising Guidelines: Events



## FUNDRAISING GUIDELINES LOTTERIES

SEPTEMBER 2017



Fundraising Guidelines: Lotteries



## FUNDRAISING GUIDELINES PAYROLL GIVING

SEPTEMBER 2017



Fundraising Guidelines: Payroll Giving



## FUNDRAISING GUIDELINES TELEMARKETING FUNDRAISING

SEPTEMBER 2017



Fundraising Guidelines: Telemarketing Fundraising



## FUNDRAISING GUIDELINES VOLUNTEERS

SEPTEMBER 2017



Fundraising Guidelines: Volunteers



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# KEY COMPONENTS TO BUILD A FINANCIALLY SUSTAINABLE ORGANISATION

Simple, But Never Easy



# 10 STEPS TO FINANCIAL SUSTAINABILITY

## TEN STEPS TO BECOMING FINANCIALLY SUSTAINABLE



### Step 1

#### **Make a commitment**

Accept that you will not become financially sustainable overnight and that it will not be an easy ride. You will have to be prepared to commit both time and money to this process. All board members should make a joint decision about starting the journey and should agree a timeline for action. This should be revisited at every subsequent meeting (make it a standing agenda item) and people who have agreed to perform tasks associated with the funding strategy should be held to account. If you do not have the skills in-house, you will need to source them from elsewhere. For example, you may need to pay a consultant or seek a voluntary mentor (try contacting your local volunteer centre – [www.volunteer.ie/about/volunteer-centres](http://www.volunteer.ie/about/volunteer-centres)).



### Step 2

#### **Articulate your purpose**

Your conviction that what you do is important is not enough. You need to be able to clearly state what your purpose is, so that you can persuade others to share your passion. You may be fortunate enough to already have a well-written mission statement, but many groups do not. Even if they have one, it is often overly long and full of jargon. Can you simply and clearly state what change your group is trying to bring about? Do you have a sensible strategy for achieving that goal? Can you describe the value of your work, for example, in terms of social or natural capital? Do you have evidence of positive outcomes that you have already generated? Grantspace provides some very good resources on how to develop or improve mission statements ([www.grantspace.org/tools](http://www.grantspace.org/tools)).

# THE ALTITUDE FRAMEWORK

<http://forimpact.org/article/altitude-framework-overview/>

**30,000'**

THE  
**WHY**  
(VISION)

**PURPOSE**

THE  
OPPORTUNITY

**14,000'**

THE  
**WHAT**  
(STRATEGY)

**PRIORITIES**

**3'**

THE  
**HOW**  
(EXECUTION)

**PLAN**

# IT'S NOT ABOUT YOU

- (Most) People don't support a cause because they like the 'brand'
- They support the cause because they are emotive about the issue
- It's about them and their relationship with the cause
- So make it about them!

## An example from the field



*"I feel blessed that I've never needed your support. But I think what you're doing is fantastic for those who do, so I'm really happy to help when I can".*



*"My cousin lost her husband just before the millennium. It was awful for her, but I know how grateful she was to the nurse who came and cared for them"*



*"I value the support you gave my mother when she was terminally ill in 1984. As a result, I donate!"*

# ASK!

- 99.99% of all successful appeals succeed because...
- There are no silver bullets, no snake oil, no goose with a golden egg so at some stage you are going to have to ask people to support you



- Asking someone face to face... is better than...



- Telephoning to ask for support... is better than...



- Writing a personal letter... is better than...



- Giving a presentation to lots of people... is better than...



- Putting out a request on the internet... is better than...



- Sending an appeal to lots of people

# 10 STEPS TO FINANCIAL SUSTAINABILITY



## Step 3 Analyse your current resource profile

Before looking for new money, it is important to take stock of your present situation. You need to be sure how much it costs you to operate and what resources (financial and non-financial) you are currently in receipt of. You need to know if any of these are likely to end and if so, when. You also need to have clarity on how you are spending these resources at the moment. A word of caution: being overly optimistic at this stage will not serve you well. There are tools that can help you in this process, such as:

- **Matrix Map** (a visual tool that plots all of the organisation's activities into a single compelling image – <https://nonprofitquarterly.org/2014/04/01/the-matrix-map-a-powerful-tool-for-mission-focused-nonprofits>)

- **Nonprofit Finance Fund's Self-Assessment** (a worksheet that helps you to capture a snapshot of your organisation's financial strengths and weaknesses – [www.nonprofitfinancefund.org/sites/default/files/docs/2010/Self-Assessment\\_Landscape.pdf](http://www.nonprofitfinancefund.org/sites/default/files/docs/2010/Self-Assessment_Landscape.pdf))

- **Sustainable Sun Tool** (an attractive tool that helps you to plot your relative financial health in different categories – [www.ncvo.org.uk/images/documents/practical\\_support/funding/sustainable-funding/Sustainable%20Sun%20Tool.pdf](http://www.ncvo.org.uk/images/documents/practical_support/funding/sustainable-funding/Sustainable%20Sun%20Tool.pdf)).



## Step 4 Make savings where possible

There is a reasonable expectation that community groups should not be lavish and should use their

limited resources wisely. Saying that, shoestring budgets are not likely to result in significant impacts. Most community groups are already very 'lean' and there is little that can be done to reduce their expenditure, so the implications of any proposed further cutbacks should be considered very carefully. However, it is always worth seeking out the following:

**Charitable discounts** (for example, software – [www.enclude.ie/technology-donations](http://www.enclude.ie/technology-donations))





**Pro bono support** (for example, legal assistance – [www.lawlibrary.ie/Legal-Services/Voluntary-Assistance-Scheme.aspx](http://www.lawlibrary.ie/Legal-Services/Voluntary-Assistance-Scheme.aspx))

**Group savings schemes** (for example, various goods and services – [www.wheel.ie/ResourcePoint](http://www.wheel.ie/ResourcePoint))

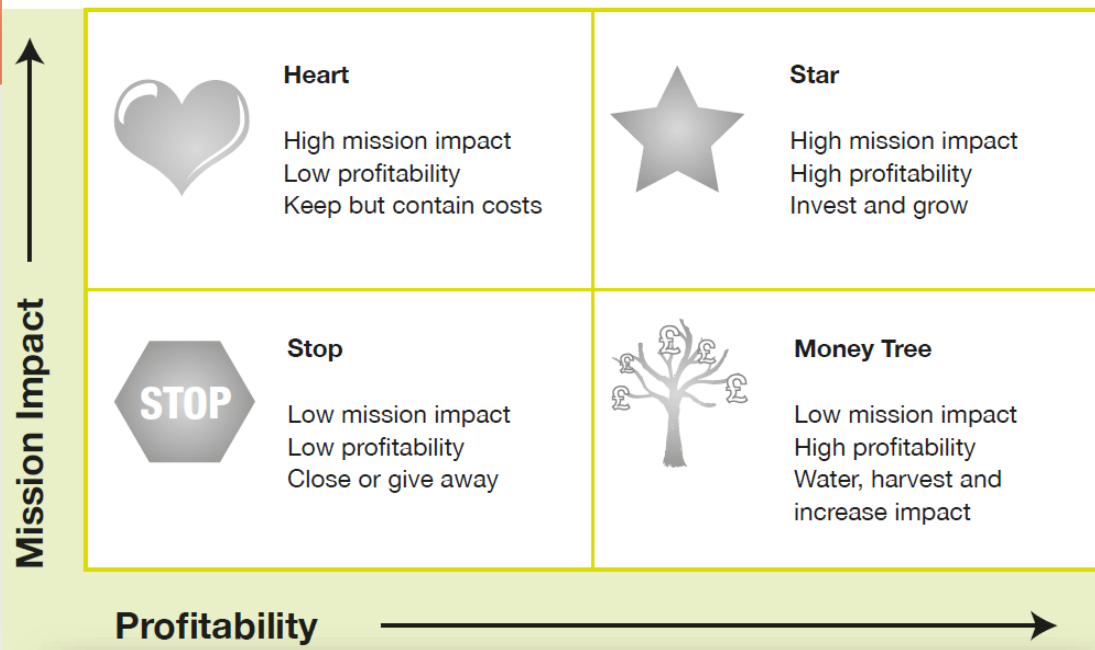
**Resource sharing** (for example, office accommodation and related services – [www.carmichaelcentre.ie](http://www.carmichaelcentre.ie)).



# INCOME SPECTRUM TOOL

	Income stream	Amount (£)	End date	Proportion of income (%)	Level of risk		
					Low	Med	High
	<b>Gifts</b>						
	Individuals						
	Private sector						
	<b>Grants</b>						
	Trusts and foundations						
	Public sector and Lottery						
	Private sector						
	<b>Contracts</b>						
	Public sector agencies						
	Private sector						
	Voluntary organisations						
	<b>Open market</b>						
	Individuals						
	Voluntary organisations						
	Public sector agencies						
	Private sector						

# MATRIX MAP



Activity	Impact	Profit	Effort	Type	Action
Early years dance class	High	Low	Medium	Heart	Keep but contain costs
Film festival	Medium	Medium but growing	High	Star	Grow and increase impact
Cafe	Low	Low	High	Stop	Stop or outsource
Antique Fairs	Low	High	High	Money tree	Grow and increase impact

# 10 STEPS TO FINANCIAL SUSTAINABILITY



## Step 5

### **Calculate how much you need**

Your earlier analysis will have pointed to any shortfalls you need to cover and to any plans you have for development over the coming years. Do not ever say: “we need as much money as possible”. Even the most generous, unquestioning donors would like to know what the money they are thinking of parting with will be spent on. You need to know exactly how much money you are looking to raise at any one time and be absolutely clear how this will be used.



## Step 6

### **Generate options**

Can you retain the income streams that you currently have and if so, is there any chance they could be expanded on? Even if the answer to these questions is yes, it is more than likely you will wish or need to explore other options too. Generate as long a list as you can, seeking the input from as many people as possible: the board, other volunteers, staff, members, users of your service, etc. You can use brainstorming sessions, questionnaire surveys, suggestion boxes or simply talk to people informally. You may be surprised where the best ideas come from and how one that seems outlandish on first hearing, can turn out to be excellent.

## CALCULATE WHAT YOU NEED

<b>The Wheel Example</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>Total</b>
Core Expenditure	524,493	520,993	517,493	<b>1,562,979</b>
Projected Income	316,700	353,730	401,451	<b>1,071,881</b>
Deficit	<b>(207,793)</b>	<b>(167,263)</b>	<b>(116,042)</b>	<b>(491,098)</b>

[Home](#) > [Funding](#) > [Fundraising Advice & Guidance](#) > [Fundraising from the Public](#) > [Our Fundraising Checklist](#)

## OUR FUNDRAISING CHECKLIST

Are you considering all the possible ways you can raise money for your cause or organisation?

This is a checklist of a comprehensive range of methods and techniques for fundraising and income generation.

Many nonprofits concentrate their efforts on a small number of fundraising activities so here is a quick list of the main ways to raise money from the general public, grant-making organisations and through trading activity.



# 10 STEPS TO FINANCIAL SUSTAINABILITY



## Step 7

### Assess options

Your aim at this stage is to come up with a shortlist of potentially viable options (we recommend fewer than ten). Do not rule anything out too quickly. Only discard ideas once they have been properly assessed. We advise that you use a scoring system – it does not matter if it is hand-drawn table or a spreadsheet, as long as it allows you to do the following:

- **Consider the criteria that are important to you** (for instance: the income potential of each idea, how easy it would be to implement and your capacity to deliver)
- **If necessary, weight those criteria** (are they all equally important or are some more important to you than others?)
- **Score every idea under all criteria** (if using a weighting system, you need to multiply the score by the weight)
- **Add up the results**
- **Place the highest rated ideas on your shortlist.**



## Step 8

### Do your research

You now need to do some more in-depth research on all of the items on your shortlist. You will need to consider all the implications of pursuing your ideas, including legal matters and other risks. You will need to find out exactly what is involved and who might be able to assist you. This will enable you to draw up a priority list. Do not skimp on this stage of the process – all this background research will help you to make the right decisions.



## Step 9

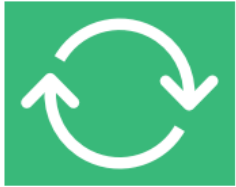
### Develop and implement an action plan

You can then draw up a realistic action plan with agreed targets, timelines and responsibilities. Now is the time to trial the first one or two ideas. Do not try to do everything at once, as this can become overwhelming. It is really important that you keep the process manageable.

# ASSESS THE OPTIONS

THE WHEEL ASSESSMENT OF OPTIONS	
Source	Assessment
<b>1. Individuals</b>	Via Membership – Excellent Via Major or Special Gifts – Limited Via Traditional ‘Annual Giving’ – Poor
<b>2. Foundations and Trusts</b>	Via one-off project funding – Good Via unrestricted Support – Poor
<b>3. Corporations</b>	Via sponsorship – Good Via one off project gifts – Good Via unrestricted support - Poor
<b>4. Organisations (nonprofits)</b>	Via membership – Good to Excellent Via restricted project support – Fair Via sponsorships – Fair to Good (co-sponsorships)
<b>5. Government / EU</b>	Via restricted project support – Very Good Via unrestricted project support – Fair to Good Via unrestricted core support – Reducing, but good

# 10 STEPS TO FINANCIAL SUSTAINABILITY



## Step 10

### **Monitor progress and adapt**

Monitor progress carefully. Be honest: look at net income, not gross income. This also means

being realistic about the time you invested into making things happen (this is what is called an 'opportunity cost'). Did things go according to plan? If so, that is fantastic: keep ploughing ahead. However, the most useful insights can sometimes be gained by figuring out what did not work, and why. New initiatives that fail the first time round could possibly become successful with some minor adjustments. Now may also be the time to try the next item(s) on your priority list.

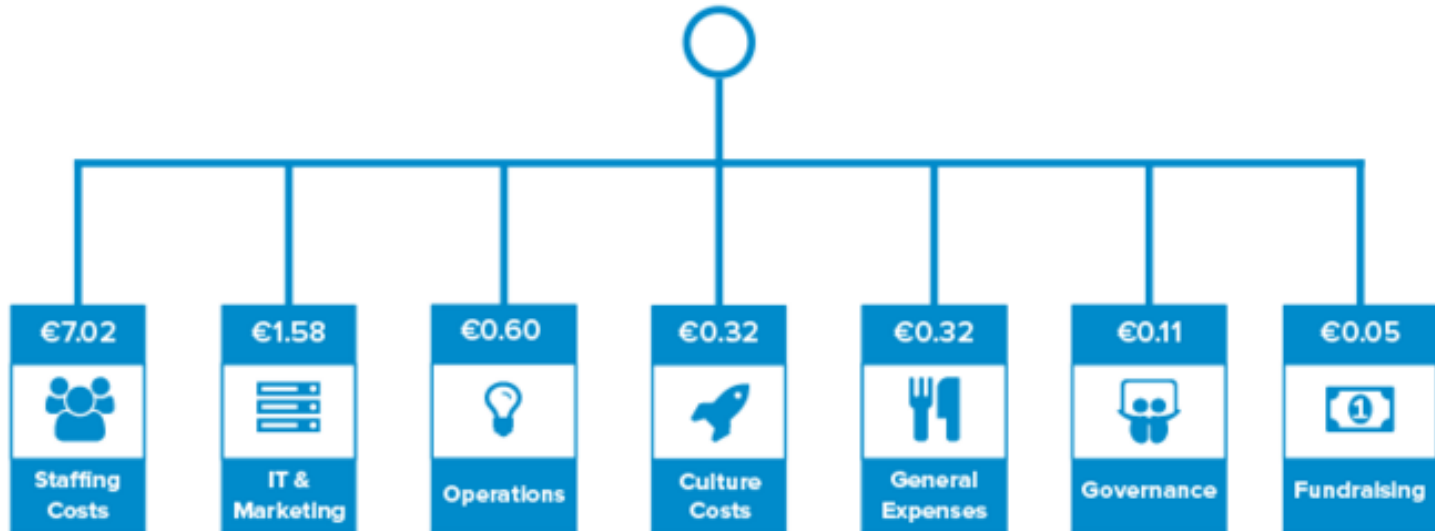


**KEEP  
CALM  
AND  
MONITOR  
PROGRESS**

TRANSPARENCY. OBVIOUSLY



Where does your money go when you donate €10?





Stronger Charities.  
Stronger Communities.

# WRITING APPLICATIONS



# TYPES

- Free Form Applications
- Form Applications



# COMMON QUESTIONS TO EXPECT

## **Your Contact Details**

- Address, email and telephone, Staff, volunteers, CHY/Legal status, Account details, turnover

## **Aims & Objectives of your organisation**

- Vision, mission, values, reason for existing

## **Background & History of your organisation**

- Proof of capacity to deliver, proven track record

## **Activities your organisation engages in**

- What are your main activities, who does them, who do you help, evidence of impact (N.B.)

# EVIDENCE BASE

1. Increasingly Important
2. How do you know the project is needed?
3. Have you statistics to back it up?
4. Quotes from clients/users of your service
5. Find statistics in reports etc; Do the research
6. What are you applying for?
7. Do you have a solution to a given problem?
8. Describe how your project meets the criteria
9. How will you monitor & evaluate the project?
10. What is the project budget?
11. Are there any 'In Kind' contributions?
12. Is the project sustainable?



# TIPS FOR WRITING A SUCCESSFUL FUNDING APPLICATION

- 1 Training** Decide if you have the capacity to prepare a winning application. If you are concerned that this is not the case, do some reading and/or seek formal training in order to prepare yourself. See <http://wheel.ie/content/your-non-profit-training-needs> for ideas.
- 2 Legal and financial paperwork** Organise the relevant paperwork well in advance. You may not be eligible if you are not legally constituted or if you do not have charitable status (for further information, see the sister publication to this one, *Sustainable Communities: A good governance resource book*). The funder will probably want to see a copy of your latest accounts.
- 3 Study the small print** Carefully read the details before you do anything else. Are you eligible to apply? Does your application have a realistic chance of success? Could you meet the funder's requirements should you be awarded the grant? This stage is absolutely vital - many applications fail simply because the group or its idea was never eligible in the first place.
- 4 Contact the funder** If you are unsure about anything contact the funder (unless you have specifically been asked not to). You can also ask groups who have more experience in applying for grants than you for their advice.
- 5 Tailor your response** Be guided by your case for support (see pages 16-18), but make sure to tailor your response to match the criteria laid out by funders. If you would have to compromise your mission or values in order to fit into the funder's criteria, do not proceed with the application.
- 6 Readability** Strive to make it easy for the people who will be reading the proposal, because they may know very little about the issue, will have limited time and will probably have many other applications to consider.
- 7 Write in stages** It is highly unlikely that you will finalise a grant application in one sitting. Draft the key points that you need to make in each section of your application before plunging headfirst into writing the detail.
- 8 Title** If possible, give your proposal a snappy name that encapsulates what you are aiming to achieve. Focus on outcomes. For example, 'Happy & Healthy Howth' sounds better than 'we need funding for a staff member, computer and fitness equipment', even if the budget shows that these are costs you will need to cover.
- 9 Provide a well-constructed persuasive argument** Your application should not read like a hard luck story.
- 10 Demonstrate your competency** Having a good idea is not enough. You also need to show that you are a competent organisation that has the capacity to deliver (by highlighting relevant skills, organisational policies, codes of practice you adhere to, results of evaluations, etc).

# TIPS FOR WRITING A SUCCESSFUL FUNDING APPLICATION

**11 Complete all sections** If a form is provided use it and fill in all sections (if not, use your case for support that we referred to on pages 16-18). Stick to the word count if there is one. Do not feel you have to fill every last bit of space. Succinctness is good, but do provide sufficient detail for the assessor to be able to understand your proposal.

**12 Write clear, concise statements** Do not repeat yourself. Avoid jargon. Only include acronyms after writing them out in full on first usage.

**13 Seek help** Enlist people to comment on the draft and ask them to look for weaknesses, which you can then address.

**14 Budgeting** Include an accurately costed budget, including the cost that any salaried staff will have to spend on delivering the project. Rough guesses are not good enough. Check whether there is a requirement for match funding and if volunteer hours or other in-kind contributions can be included as a matched income source.

**15 Monitoring and evaluation** Decide if you will be able to monitor and evaluate the project internally yourselves, or if you will require external support from a third party. Think about the methods you will use (project records, questionnaires, focus groups, etc) and what the cost implications of these will be.

**16 Proofreading** Spelling and grammar errors will call into doubt the quality of your proposal and your team, so be meticulous. Ask a competent person to proofread the form. Neatness and consistency matter.

**17 Supporting information** Provide supporting material if it has been requested and if it adds value to your application, but not if you have explicitly been asked not to. You can always offer to send more information on request. You can also issue an invitation to visit you.

**18 Stick to the rules** Do not ask for more than the maximum available grant as this will likely automatically disqualify your application.

**19 Meet the deadline** Funders are extremely strict about this.

**20 Keep a copy** of your application and records of any correspondence or telephone communications you have regarding the application.

**21 Submit** Cross your fingers and wait. You should also consider what grant scheme you might apply to next.

**22 Feedback** If not successful, consider seeking feedback from the funder. Stress that you are not making a complaint about being unsuccessful, but really want to know how to improve the application for future attempts.

# FREE FORM APPLICATIONS

## **Covering Letter**

- Brief outline of the who, what how, where, when and why

## **Main Application** (2 paragraphs)

- Background to your work, history of org, aims & objectives, vision mission & values etc

## **Background to your area/client group**

(2–3 paragraphs)

- Identify problems, needs, who is doing what, what/who is succeeding

## **Project Rationale** (1 paragraph)

- Why are you doing what you are doing and why this is the solution to the specified problem

## **The Project** (3–4 paragraphs)

- The name of the project, summarise the components, benefits, evidence base, evaluation

## **Budget** (1–2 paragraphs + table)

- Breakdown of costs, include any 'in kind donations

## **Grant Request**

- How much are you requesting from the funder?

## **Enclosures**

- Copies of constitution, annual accounts any supporting documentation only when requested



## ONCE YOU SUBMIT

1. Know what happens next
2. Know how it is progressing
3. Keep records of correspondence
4. Make more applications



**the  
wheel**

Stronger Charities.  
Stronger Communities.

**SUCCESS V  
FAILURE**

# TEN REASONS WHY APPLICATIONS FAIL

1. The applicant is not eligible for reason of its legal form, lack of charity status, size or geographical remit.
2. Projects are not well planned.
3. Applicants do not present their project clearly and concisely on the application form.
4. The applicant fails to demonstrate that they meet the criteria or asks for something the funder will not fund.
5. Applications are made without monitoring and evaluation processes in place.
6. The budget is problematic and/or unconvincing financial management procedures.
7. The applicant misses the deadline.
8. The form is incomplete or illegible.
9. The supporting documents are incomplete, inaccurate, out-of-date, contradict the application form or are simply not enclosed.
10. The applicant is asking for too much



# TEN REASONS WHY APPLICATIONS SUCCEED

1. The organisation makes an application.
2. The need for the project is strongly evidenced and the applicant convinces the funder that it is the best placed organisation to tackle it.
3. The applicant chooses the most appropriate funders to approach.
4. The applicant researches the funder intensively before an application is made.
5. The application is received by the deadline – fully completed with up-to-date annual report and accounts, governing documents, bank account details and all other relevant enclosures.
6. The applicant has an amiable working relationship with the funder through the application process.
7. The application stands out against other applications for the same pot of money and the funder can see what it is getting for its money.
8. The budget is accurately costed, sources of match funding are in place and the applicant asks for a realistic amount from the funder.
9. The applicant has good governance, management, administration and financial procedures in place.
10. The applicant has a good track record in delivering funded projects.





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# QUESTIONS & ANSWERS



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# THANK YOU



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