



BN(S) Annual Conference/AGM 2004 Befriending or Bust: Key Skills for Effective Fundraising

Thursday, 7th October 2004, Ramada Jarvis Hotel, Perth

Many befriending projects are caught up in the trap of having too few funders and too few funders to approach. There's a small world of 'usual suspects' out there and everyone is after them. The 2004 conference explored the essential elements needed to develop an effective fundraising strategy in a small organisation and provided delegates with the opportunity to consider the central questions and issues involved. The afternoon workshops offered delegates the chance to gather evidence and discuss typical funding issues while the Annual General Meeting offered the chance for members to hear about and comment on BN(S) work in 2003/4 and the Network's plans for the future. Sixty-three delegates representing 40 varied befriending projects across Scotland attended the event.

Befriending or Bust: Achieving Fundraising Success

Jacqui Clark, Scottish Branch, Meningitis Research Foundation

You have been volunteered to fundraise for your befriending project but you are not a fundraiser. You now have some choices/decisions to make. Do you panic? Hide? Run away? Plan? As tempting as the first three options may seem, the fourth option will help you deal with your new challenge more effectively. So how might you go about this?

1) The Current Fundraising Climate

The following list represents the main challenges in fundraising today:

- Increasing number of applicants chasing a decreasing pot of resources
- Increasing professionalism, creating better practice, but higher competition and increasing demands in quality of approach
- Impact of Office of Scottish Charities Register
- Negative effects of bogus charity collecting
- Economic slumps (e.g. effects of 9/11)
- Corporate sector redundancies: results in reduced community involvement and charitable giving
- Ever-changing priorities in a fast-moving world
- Lack of core and continuation money; preference for short term project funding
- Funders dictate the agenda; organisations often chasing the money and changing their activities to fit funders' objectives, not their own

2) *Before You Start Fundraising*

- **Resourcing your organisation:** fundraising isn't all about money. Think of it more as how you enable your organisation to achieve its aims & objectives.
- **Fundraising strategy:** fundraising is not rocket science basic: common sense is enough, but a good plan or fundraising strategy will help. This needn't be complex - a few key headings to are enough e.g. your funding history; current funders; current fundraising methods; funding priorities/shopping list; what is your plan; what methods will you use to fundraise; what sources will you use; what are your timescales; how will you monitor and evaluate your fundraising
- **What are you asking for?** Be clear about what you want the money for – if you aren't sure, a potential funder certainly won't be!
- **What is your message?** What messages does your organisation/project give out – how does it come across, what are its strengths and its development needs? Consider what you want to highlight, and what you want to play down. In other words, what will a potential funder 'see' when it considers your organisation's activity?

3) *Handy Hints for Fundraising*

- **Research:** successful fundraising requires good research – both collating useful information and using it effectively. Ask yourself, what has the funder supported in the past? Who have they supported? Average donation? Current priorities?
- **Be creative:** think outside the box, go to alternative sources (bearing in mind that most organisations go to the same funders, eg Big Lottery & Scottish Executive). Try: websites; databases; funding guides & directories, internal sources such as board members & their contacts; clients/service users' contacts, families and friends, volunteers and staff; business and trust directories, annual reports and newspapers - especially business pages.
- **Don't forget your existing funders:** can they give you more money for a different piece of work, if not the same work? If they like what they see they may give you more!
- **Personalise:** personalise your approach whenever possible; standardised letters are unlikely to succeed. Send applications to a named person, preceded and followed up by phone calls.
- **Think of your unique selling point:** corporates can get good PR elsewhere – what they need from a charity is something unique, something special.
- **Networking:** who you know is key – build relationships & nurture them.

4) Securing Ongoing/Continuation Funding

It is particularly hard to find repeat funding to continue existing work. In this climate, much emphasis is placed on funding the new, the innovative, the exciting. The challenge here is to present or package existing work differently.

- **Repackage:** consider how to (re) package your work so that it will continue to appeal to a funder. Rather than breakdown salary, admin & travel costs, try identifying the unit cost for each client per year.
- **Don't rely on existing funders:** never assume that a funder will continue to fund you, just because you still meet the criteria.
- **Prevention is cheaper than cure:** highlight the preventative nature of the work – the cost savings if your project didn't exist. This should help if the statistics don't help justify the value of your project.
- **Cocktails:** broaden your income base with a 'cocktail' of funding & don't rely on one source for each aspect-but several.
- **Evaluate your work & demonstrate its effectiveness:** measure & demonstrate the impact of your project or organisation to attract & maintain future funding. Many funders are encouraging applicants to build in costs for financial sustainability e.g. evaluation, research, publication and conference costs to disseminate findings, measuring the impact and hopefully to attract further funding.
- **Loans:** if you can build some sustainability into your project, perhaps consider a loan. Some organisations are taking out loans for projects and services that can create sufficient surplus to pay back a loan, and building an asset base where possible.
- **Partnerships:** consider working in partnership with another organisation where possible. If feasible it can demonstrate better value for money and avoid duplication of a service.
- **Self sufficiency:** look to be more financially sustainable: can you generate your own income somehow? Fees? Training costs? Capital/assets? Secure longer-term funding arrangements wherever possible.
- **Alternative resources:** is money what you really need? Could support in kind achieve the same objectives? For example, a secondee, a donation of catering, free room hire, volunteer support, help with printing, e.g. a newsletter; share a minibus rather than buy your own?

5) In Conclusion:

1. Get to know your organisation: highlight the positive aspects and develop the weaknesses.
2. Be very clear about what resources you need.

3. Do thorough research on potential funders.
4. Be clear to target an application to the appropriate funders, and send as many as you can manage.
5. Be creative. Don't take on work simply to attract funding, but repackage what you already do to fit current trends.
6. Sell the concept to funders – showing what makes your project unique, and highlight the implications of the work NOT being funded.
7. Build in costs of evaluation to demonstrate effectiveness of the work & value of funding.
8. Don't be afraid to seek help! It might not feel like it, but you are NOT alone! Many other organisations are in the same boat and can sometimes offer support. Fundraising is not an exact science, but neither is it rocket science! Few of us have the luxury of dedicated fundraisers-it's often an add-on to our many other tasks.

If you do your research, demonstrate the benefits of your work, show the consequences of not being funded, then you're on your way to funding success. The rest, I'm afraid is down to luck.

6) Other Sources of Information & Advice

- Organisations: Institute of Fundraising, SCVO (Scottish Council for Voluntary Organisations), Charities Aid Foundation, Scotland Unlimited, Rethinking Generation, Social Enterprise Academy
- Publications: *Third Force News* (see page 8, Inform Listings, Funding section), *Third Sector*, *Charity Times*, *Business Insider*
- Further reading: no better place than the *Directory of Social Change* – see their website for all the relevant guides and directories

Befriending or Bust: On the Receiving End – A Funder’s View

Sandra Carter – Chief Executive, Voluntary Action Fund (until earlier this year called the Unemployed Voluntary Action Fund) which provides funds for volunteer-based community projects. VAF has funded many new befriending projects at their initial stages of development.

There is no point in appealing to the heart: a good funder will be *almost* always be heartless: at VAF we are good at this. We have been funding befriending services in every round of grant funding since UVAF was set up in 1982.

Despite a recent name change, there is little difference in our ethos and we continue to deliver grant schemes that reflect the principles of: empowerment and inclusion; overcoming barriers and challenging inequalities; responding to the needs which address disadvantage; building skills and confidence; targeting resources at disadvantaged organisations and individuals.

We pursue an approach of developing and disseminating a framework of best practice through transparency; fairness; rigour; high standards; action research and disseminating results; systematic monitoring and evaluation. Our style is to add value to the voluntary sector in Scotland through training and support; encouraging networks; contributing to national forums.

So what can I tell you about being on the receiving end of an application? We spend more time on each application we receive than I have room to talk about. Last week we were on the receiving end of over 400 applications – all well qualified.

So why am I here? What links befriending schemes and some funders more than others? What have you and I – your organisation and my organisation – got in common? What should we have in common if your organisation is considering making an application to my organisation? Why have so many befriending schemes been funded by UVAF/ VAF?

The answer to most of these questions is in the list of principles I gave earlier. The language of inclusion and equalities should be ringing bells and not just because they are the right things to say in a funding application. So what really does go in a funder’s head? Or more specifically, what is the tie that binds befriending projects, and clicks with us as funders?

The answer? It is not befriending. It is VOLUNTEERING. Volunteering to achieve befriending. And this is what as a funder I want to know: 1) Is volunteering strategic to the development of your activities; 2) What will be the evidence of that?

So why do we fund one organisation but not another when both exist to befriend young people at risk of offending? I have got to make an assumption here that our *Guidance for Applicants* (which outlines priorities for funding and what to include in a submission) has been studied, read, understood and applied. Guidance booklets are not just background: every word has been carefully chosen; every phrase is important.

In a competitive situation, the features we are looking for:

1) The balance of volunteering and service delivery

Case Study 1: A mental health befriending project working with young men up to the age of 25 in a rural part of the country is looking for funding to enable former service-users to become trained befrienders. Most of the service-users have never been in a position to volunteer before.

My analysis would be that there are serious barriers to overcome here so you will need to identify and outline how you will address them. There is the potential here for real inclusion but the project needs to deal with the fact that they are young people, have a history of poor mental health; are likely to have low confidence and low self-esteem. This isn't all negative as you can also highlight their knowledge and experience although not necessarily in the wider community.

If we were reviewing this application as a funder, we would be looking for things like:

- Tailored recruitment strategy – an ad in the local paper may not hit the spot, but young people listen to the radio. If word of mouth is still how majority of volunteers are recruited, what networks are used by people who are excluded?
- Allocation of time for support: can they be buddied? Have you allowed for supervision of volunteers?
- Recognition of need for resources for training volunteers: what approach will the project take?
- Volunteers' expenses: is the rural issue taken into account?
- Are the project's expectations realistic?
- Are there clear ways of working that tackle exclusion e.g. arrangements for referrals.

Case Study 2: A city befriending project, working with young people under 18, wants to increase the range of activities their befrienders can carry out with their befriendees. With a small budget for expenses, such that they can't even afford a fortnightly trip to the cinema, how do they make up the shortfall. They think this problem is why they regularly lose good volunteers who are disillusioned as to how little they can do with their befriendees...

If funders' rules say volunteers' expenses, but don't mention client benefits, think out of the box. One project got round this by getting a school pupil placement for a fortnight to pull together a directory of free activities in Edinburgh suitable for young people.

2) Other areas that we as a funder would look at, or want to be assured that projects understand, is that:

i) Policy and practice or volunteering does not happen by itself:

- Is this a bolt on or a project that is part of the development strategy of the organisation – e.g. why are service users becoming volunteers?
- Is the activity under-pinned with policies, either in place or in the planning?
- Are those policies implemented? What's your practice?
 - To do with volunteering
 - To do with equality: is your equal opps policy proofed for volunteering?
 - What are your employment policies like?
 - How is health and safety handled?

- Insurance?
- What's the practice on child protection / vulnerable adults?

ii) Projects need to demonstrate an understanding of what's needed even if it is not yet in place. If volunteering is the lifeblood that this funder is looking for, how do you show you are serious?

- Are you aware of the infrastructure bodies around to assist?
- The Government has just published a Volunteering Strategy: have you read it? You may think you are not directly affected by some government initiative, but the practice expected by funders is likely to be affected by this debate (a copy of the Volunteering Strategy is available from the BN(S) documentation library; alternatively, you can download a copy from the VDS or Scottish Executive websites).

3) So what are some of the turn-offs for a funder?

- A chaotic ramble that appears to hide a really interesting, potentially fundable scheme: show that you have planned, consulted and are meeting an identified need
- An over-ambitious proposal that cannot be achieved: have realistic targets, timeframe and budget e.g. a half-time worker recruiting and supporting 50 volunteers with poor mental health – NO!
- An opportunistic approach to involving volunteers e.g. a project with an untested assumption that because people are unemployed they'll be available during the day and willing to volunteer
- Confusing volunteering with participation
- A proposal that is very strong on need but weak on delivery – all the energy has gone into why and not enough into how it should be delivered
- A mismatch between a job title and job description – a volunteers' manager who is really expected to be a project manager, leaving volunteering to evolve, or not, without proper direction
- A cavalier approach to monitoring and evaluation – no framework – and lack of awareness of need to assess impact
- Duplicate applications from neighbouring projects that show an absence of local networking

4) To dispel some myths about finding funding for projects:

- You don't have to keep re-inventing what you are doing, *but* if you are still operating in exactly the same way as 10 years ago, you are not the sort of organisation to attract funding. Every organisation needs planned development.
- You don't need to innovate but pioneering can be a useful approach.
- Funders should be approached and asked for assistance. They are not going to write your applications for you but they will give advice and information if you ask. Go to roadshows, use helplines.
- You can expect, and if it is not forthcoming, ask for feedback if you are unsuccessful
- You may challenge the funder e.g. the Lewis Befriending Service applied for funding for a generic service. Our Trustees said this is too ambitious, and suggested they reduced the scope to befriending older people to address the issues of ageing population, and gave them the money anyway. At the end of the first year, evidence of referrals showed that there was a greater demand from people with poor mental health. The trustees agreed to continue project as generic, although main users were older people and those with poor mental health.

- Share your experiences: local training or an expenses paid trip further afield e.g. to Stornoway for training and other purposes
- You can change direction! e.g. Leonard Cheshire Edinburgh relocated from a large institution to small group homes applied to set up one-to-one befriending. However, once started, the work was not gelling, and some of the matches were not going smoothly. The projects noticed that when all befrienders were together with befriendees there was a really positive atmosphere so the project moved to group befriending, from which natural matches emerged to achieve the initial aim. The moral: talk to funders! We will listen!

Just to finish, I said that funders were almost heartless – there are some things that it does no harm to show, such as:

- Enthusiasm for your proposal
- Conviction about your policies
- Commitment to your principles
- Passion about your vision

Befriending or Bust: When Funding Disappears

Interview session with Pegs Bailey (formerly of Big Brothers & Sisters) and Matthew Day (formerly of East Lothian Befriending Scheme)

Many of our members have told us how shocked they were to read of the sudden closures of East Lothian Befriending Project and Big Brothers and Sisters in the summer issue of *Net Gain*. Both projects closed earlier this year due to funding problems. Former Project Co-ordinators, Pegs Bailey of Big Brothers and Sisters Edinburgh, and Matthew Day from East Lothian Befriending Project were interviewed by Befriending Network Scotland's Pauline McLaren, to give an insight into what can happen when funding runs out. Before the day, Pegs and Matthew were given the following questions to ponder:

- When you had an indication that problems were starting?/How did you hear about it?
- What did you do initially when you knew the project was in danger?
- How difficult was it to come up with a solution in a short time-scale?
- What did you need to happen in order for your plan to succeed?
- What were your feelings as the project drew to a close?
- Any lessons learned – is there anything you would do differently now?

The key points to come out of these interviews were:

1. Planning

Make sure you not only have a Plan A, but a Plan B and a Plan C too. Also ensure you know how long it will take you to implement each plan. In Pegs' case, she had some contingency plans in place when it was clear the project was in difficulties at a national level (e.g. helping Big Brothers and Sisters survive in Scotland under the banner of

another charity), but didn't have time to implement them successfully when the project folded after the withdrawal of Home Office funds in England.

With hindsight, she would have explored these options in more detail, earlier on, so that there was a much better chance of these options succeeding when she really needed them to (as it was, she only had a window of 2 weeks to try and save the project in Edinburgh).

2. Have Clear Lines Of Communication With Your Funder(s)

In Matthew's case, he came into the role in the second year of a three year project. To start with, Matthew's priorities centred around hitting initial targets, setting up matches etc. and it was only later that he was able to turn his attention to continuation funding – something he now wishes he'd thought about right from the start.

He did attempt to build good links with his funders – but found this was often thwarted due to high staff turnover of Grants Officers. This meant there was a lack of continuity – and also mixed messages.

Some of these confused messages given by his existing funder (particularly in relation to whether or not – and when – his Scheme should become a limited company) led to him delaying applications to other funders – which meant that when he was turned down for continuation funding, there were no other options for him to choose from and the project was forced to close.

3. Don't Put Your Eggs Into One Basket

You can't assume that your existing funder is definitely going to fund you again and even if you're fairly certain this will happen, you need to have other options in place at an early stage. If funding applications are being refused by numerous funders, you need to have enough time to alter/adapt what you're asking for.

4. Telling Your Service - Users/Volunteers

Both Pegs and Matthew admitted that the hardest part of their projects closing down was having to tell service-users and volunteers about the closure.

Both were really heartened by the reaction they received – which was generally concern that Pegs and Matthew were being made redundant. They were also encouraged by the fact that many of their longer-running matches continued to meet on an informal basis.

5. Trust Your Gut Instincts

There were indications early on that both projects might get into difficulties – but both Pegs and Matthew were told by several other key people that they didn't need to worry.

Both wish they had listened to their instincts earlier on, in order to buy themselves some extra time and salvage the situation.

Befriending or Bust: Back from the Brink – A Project’s Story

Sheila Campbell, Argyll & Bute Children’s Befriending Scheme

Sheila has been the Co-ordinator of Argyll and Bute Children's Befriending Scheme based in Lochgilphead since its inception in April 1989 where her duties have included fundraising from a range of sources for the continuation of the project over its 15 year life span.

Sheila took us through the range of funders that have supported the project over its life and compared her journey to the Yellow Brick Road in the Wizard of Oz: at times it can be like the Scarecrow – your hopes vanish and blow away; at times you need the courage of a lion and funders can as heartless as the Tin Man – you need to oil them a bit!

Lessons learned for Sheila over time have been:

- **Get help:** Sheila learnt that she couldn’t run the project and do all the management, development and fundraising by herself – she approached funders with that message and got support for additional staffing help
- **Keep the message simple:** At one point Sheila took a map of her target area to a meeting with a funder to show the difficulties of the rurality of the area. This was a powerful message to give them.
- **Using agency agreement as a lever to get other funding:** local authority commitment of money meant that other funders came on board
- **Be prepared for change:** the project almost suffered from a change to local authority area boundaries and had to renegotiate what it could achieve in which geographical area
- **Stagger your applications:** the project at one stage was a month away from closing and but for the intervention of an individual donor would have folded. Since then they have sought to time funding applications to cover different time periods so that there is not the cliff-edge of all funding ceasing on the same date.
- **Funder rotation:** Sheila’s experience of going back to funders who had previously supported the project but who have had a couple of years off is that they have reacted by saying “Oh good...you’re still going...how can we help this time?”
- **Diversify:** the project has recently received income for doing commissioned work for the local authority to look at the development of befriending. At the same time it has remained focused on its core business and hasn’t got pulled away from this.

Today the project is funded by a package of money from Argyll and Bute Council, Children in Need, Lloyds TSB Foundation for Scotland, The Lankelly Foundation, The Robertson Trust.

And her final words of encouragement? “You will hear ‘no’ more often than ‘yes’... but persist, enthuse, commit and work hard!”

Minutes of Befriending Network (Scotland)'s AGM

1. Introduction

Rosemary Cameron, the Chair of the Board of Directors of Befriending Network (Scotland), opened the Annual General Meeting for 2003/04 at 12.20pm.

2. Apologies

Apologies had been received from: Helen Moss, Voluntary Action Orkney; Hannah Hutchison, Stirling District Association for Mental Health; Ruth Bowen, Bield Housing Association; Joette Thomas, Befriending Network Scotland Board Member

3. Previous Minutes

The minutes of the Annual General Meeting of 2/10/03 were approved as a true record.

Proposed: Alana Trusty Seconded: Jim Leary

4. Annual Report and Development Plans

Rosemary invited staff to provide detail on the annual report: Mike Nicholson (Development Manager) highlighted work undertaken in the year under the four headings of the organisation's Strategic Plan:

Strategic Aim 1 – Explore options to develop support for befriending projects UK-wide:

discussions had taken place during the year within the Board and with the Home Office as they committed to the development of a mentoring and befriending network in England. The Board elected not to bid for the work and to retain a focus on Scotland but to offer consultancy and training assistance to the new English organisation. Negotiations were now underway to progress this.

Strategic Aim 2 – Improve practice in befriending projects: continued with Information Service and training and networking events. Over 700 enquiries dealt with, library of project documentation expanded, model forms produced, website developed with the addition of a members' area, Directory of Members produced, 4 issues of 'Net Gain', 4 Resource Sheets on good practice issues, 3 sets of Common Ground Meetings held in 9 locations, 14 training events run. Planned development of the service for 2005 onwards to include the formation of an evaluation toolkit and best practice guidelines for different project types.

Strategic Aim 3 – Be the leading thinkers in the field of befriending: consultancy service developed with evaluations, audits and policy writing undertaken for projects. Contributions made to research work with the University of Aberdeen, participation at housing, homelessness and mentoring conferences and representation on voluntary sector committees with SCVO.

Strategic Aim 4 – Be a quality voluntary organisation: appointments made to the Board to increase knowledge of management, personnel and fundraising issues. Development of improved Human Resources policies by Personnel Sub Group and agreement of external expertise in this area offered on a voluntary basis from the private sector. Last year's plan included looking at development of a stronger UK network, a specific Training Officer post, an Evaluation Toolkit, a Video on Befriending, and options for Research projects.

5. Financial Report

Les Jacobs, Treasurer, presented the Financial Report for 2003/04. This highlighted that income was: 56% Grants, 13% Membership Fees, 12% Events, 12% Consultancy, 4% Publications, 2%

Interest, 1% Admin Fees. Key changes in the year had been introducing consultancy as a means of income generation. There was a reduction in income from trusts. Expenditure had been 63% Salaries, 13% Office/Info Services, 6% Professional fees, 5% Premises, 4% Publications, 4% Events, 4% Staff/Committee costs. The outlook for the next year (2004/05) is:

- i) Funding coming in from Scottish Executive and Lloyds TSB foundation towards the Training Officer post
- ii) Fundraising for 2005 onwards to replace the current Community Fund support
- iii) Increase in consultancy income

Andrew Findlay noted from the floor that there was an inaccuracy in the financial statement of the Annual Report where the totals for expenditure were missing. Mike Nicholson noted that an adjustment would be made prior to any further reports being printed and disseminated.

James Adam queried what the membership fees were. Mike Nicholson noted that for the year reported on the membership fee had been a flat fee of £38 for all organisations with £20 for individuals and unstaffed organisations. This had been changed at the end of the year to have a scale of £40 and £50 for organisations with incomes under and over £50,000 respectively. The accounts were presented to the members and approved. Proposed: Christine Hutchings; seconded: Shirley Wright

5. Appointment of Accountants

Rosemary noted that Befriending Network (Scotland) were satisfied with the work of accountants McKerrill, Brown and Gray of Edinburgh and felt that they provided competitive rates. She therefore proposed their reappointment for the year 2004/05. Proposed: Alana Trusty; seconded: Christine Hutchings

6. Election of Board Members

In accordance with the Memorandum and Articles of Befriending Network (Scotland), all Appointed Directors stood down, as did 50% of Member Directors. Rosemary particularly thanked Kathryn Thomson and Claire Binnie for their contributions to the Board in recent years as they were not standing for re-election. Nominations had been received for Member Director vacancies: Colette Gallagher (COVEY) and Christine Hutchings (Midlothian Befriending Scheme) standing for re-election, and Andrew Findlay (Interest Link Borders) and Melanie Small (BefriendER) nominated for the first time. No objections were raised to proposing the acceptance of the nominees as a group. The group was proposed as new members for the Board of Befriending Network (Scotland) for 2004/05. Proposed: Marion McIlwraith; seconded: Annette Richards The Board members for 2004/5 are:

Rosemary Cameron (Chair), Carers
Befriending Project
Sheila Campbell, Argyll & Bute Children's
Befriending Scheme
Andrew Findlay, Interest Link, Borders
Colette Gallagher, COVEY

Christine Hutchings, Midlothian Befriending
Scheme
Jim Leary, SOLVE
Les Jacobs, NHS Greater Glasgow
Melanie Small, BefriendER
Joette Thomas, Synergistia

7. AOCB

Mike Nicholson noted thanks to NHS Greater Glasgow for the arrangement that had provided BNS with a Treasurer for the last 4 years.

8. The AGM was closed at 12.45 p.m.

Workshops

A: Forging Links with Your Funders

Facilitated by Jim Leary, SoLVE

The group first looked at the question “What is a Good Relationship” and said meant the following:

- Keeping funders in the picture
- Regular evaluation of progress against targets
- Putting appropriate logos on promotional material
- 1-to-1 attention with funder representative, if possible

So when should you start building a relationship with your funders? The group felt that this should be done as soon as possible but should also take into account:

- Funders’ own timescales (e.g. when will application be considered)
- The importance of doing early research (do the funder’s criteria match your own?)
- Negotiating a timescale within which the project will happen
- Building flexibility into the relationship, to avoid clawback of funds

So what do funders expect in exchange for giving you a grant?

- Clear reporting procedures
- Ongoing communication
- An agreement on service delivery
- To be notified if service delivery is going to change
- Demonstrated demand
- Expectation that money will enable project to develop in some way
- Continuous evaluation

Where can you go if you’ve had funding for a project, you want it to continue, but you can’t go back to your original funder?

- Seek public funding
- Local authority money
- Scottish Executive
- Health Board
- Use Funder Finder

B: Exploiting the Talents of Your Management Committee

Facilitated by Pegs Bailey (formerly Big Brothers & Sisters)

Pegs’ group looked at the role your Management Committee can play in helping you secure ongoing funding. People in the group found that their Management Committees/Boards were involved at differing levels and agreed that the following helped:

- When you have an election make sure you don't have too much change on the Management Committee/Board (consistency helps when you're planning funding)
- Make sure you have a strong chairperson who will be on your side
- Be open
- Make sure your meetings are focused (if you let them wander, you won't get anything done!)
- Ask your Management Committee to come along to other internal meetings you might be having (e.g. volunteer meetings) so they get a feel for what's happening at grass roots level
- Tell your Management Committee/Board a story at each meeting – e.g. a success story with one of your clients – and also include these in newsletters etc.
- Hold a development day for your Committee and staff members
- If you have a task you want carried out, create a sub-group on your Committee/Board whose specific aim is to achieve it
- Don't forget to ask your Management Committee/Board for help. If your meetings usually consist of you telling them about your successes – they may feel like they've got nothing to offer you. Make sure you ask them for help & often the best way to do this is to be task specific – i.e. I want to do this, how can I use your experience to help me with this...?
- Remember your Management Committee/Board are volunteers – so make sure you don't forget this! They need thanks, encouragement and proper expenses.

The group then looked at what an effective and ineffective Management Committee would do:

Effective

- Happy to spend time trawling charities databases to help you with funding/knowning who to approach
- Would help you raise your profile with other agencies and seek out potential funding partnerships
- Use their own personal networks to help you
- Back up staff
- Advising on funding applications
- Would have a funding sub-group to drive forward funding agenda
- Organising local activities (e.g. charity ball)
- Take an active interest in the project and its ongoing funding success
- Be active between meetings – carry out tasks promised
- Be clear on their roles and responsibilities

Ineffective

- Management Committee/Board members not reading briefs before meetings
- Wanting to underbid or overbid for cash (not being realistic)
- Not involving staff in applications or leaving it all totally up to staff
- Leaving it too late
- One application at a time approach
- Come up with ideas – but no time to support them

C. Funding the Unknown

Facilitated by Simon Glen, Edinburgh Headway Group Befriending Project

The Group was led by Simon Glen and was scribed by Elaine Smith.

What is Befriending?

The group were asked to think if they could draw up a generic definition of befriending. The following were mentioned:

- To promote a relationship of trust
- A relationship between a volunteer and a person identified as requiring a need
- Befriending is a service
- A supportive friendship
- A supported social friendship
- Has a focus on a shared activity*
- It has a goal, a thing to be achieved, an aim of alleviating social isolation
- There can be implicit or explicit needs
- It is a listening ear

(*We went back through the list and checked which of the statements applied to all the groups that were present. Those that did not apply to all are marked with a star.)

We also talked about how the befriender may not feel that they are providing a befriending relationship: perhaps the broadest aim that we are all working towards is alleviating isolation.

What is our Unique Selling Point?

If we treat befriending as something to be marketed, what would we say are the things which make us different to other projects or services? The group came up with the following suggestions.

- Because it's a volunteer there are a different qualities to a paid worker
- There is a simplicity to the relationship - the listening ear may be all that is required (as in telephone befriending)
- It's (usually) one-to-one
- The time is freely given by volunteers
- The person can choose whether they want to have a befriender or not
- It is regular, agreed and the volunteer will be there
- It can be a long-term support and can outlast services and particular workers in services
- It gives stability

These are the points we need to be making to funders in our applications.

What are the common misconceptions that the public or funders have about befriending?

The group generated the following list of misconceptions:

- That it is a taxi service to get people around
- That the volunteers have suspicious motivations
- That it's a low level or low intensity activity

- That it's a second rate service or just an add on to other things
- "It's only two hours- what can that change"
- That it's like a baby sitting service
- That the family is needy and the befriender will have to do everything for them
- That the role of the befriender is not well defined
- That the befriender is there for the whole family rather than one member of it
- That referrals are just a tick box exercise so that social workers can close the case or move it on.
- That staff costs are high (lack of understanding of the associated costs)
- That volunteers shouldn't need expenses
- That volunteers don't need support once they have started
- That staff don't get paid
- Lack of understanding about why family and friends don't help out.
- That the nearest match will be the right one (not understanding the complexity of matching)
- That it's only in low income areas and places where there is high deprivation that need befriending
- Having a high insurance premium indicates that they feel work is high risk
- Lack of consistency between salary scales
- That males shouldn't volunteer with children or young people
- That there are or can be standard unit costs- all projects should cost the same

The next step was to think about how these misconceptions could be challenged.

How might you address these misconceptions?

We spoke about ways that we could address these misconceptions:

- Communicating effectively with others over the procedures, policies
- Letting people know what could be expected.
- Targeted at volunteers, clients (and potential clients) referrers, carers, funders etc.
- There needs to be clarity in addressing these issues
- Take responsibility for challenging a misconception when you hear one
- Being proactive to get your message across
- Different types of information for different people
- Monitoring and evaluation reports can provide evidence

We then split into two groups to consider two different questions.

Group 1: How do we translate the benefits of befriending into language funders might want to see?

The group felt the best way to do this was to be clear and positive about what befriending can do. They went back to the definition and came up with the following:

Befriending is a supportive and monitored relationship between a volunteer and an individual with identified needs, initiated and maintained by an organisation. It will train, screen, assess and train volunteers to meet the identified role.

The whole group agreed that this was an acceptable definition of befriending. They went on to consider other things that could be clearly stated e.g. about staff costs and objectives but ran out of time.

Group 2: How do you overcome the lack of statistical type information? What other types of evidence could you provide?

- Thank you letters (from all of referrers, clients, volunteers, parents, other funders, etc)
- Positive feedback
- External evaluation reports
- Particular achievements of your organisation (eg IIP)
- Surveys
- Stats and Graphs in reports (maybe from Volunteer Centres)
- Working out the unit costs- weekly rate, monthly rate, yearly rate (this was noted as being very successful with funders)
- Linking to local strategies and volunteer strategies, meeting criteria set in your area
- Evidence of working in partnership and new links and referrers
- Case Studies: using high profile volunteers, eg ex social workers, people from an ethnic minority, disabled people
- Visual evidence like photos, press articles etc
- Showing the other involvement of your volunteers (eg in fundraising, training) and showing their development
- Showing user involvement and consultation results
- Budgets
- Training –internal and external
- Numbers of volunteers recruited support sessions
- Showing the staff or management structure
- Business plans

These things all show the value of your service to those people who use it (clients, volunteers, referrers etc). The groups came back together to give their feedback.

What Statistics do we have?

As a last exercise we picked up on an issue from the last feedback we considered what statistical evidence we collect routinely - and may be of interest to funders.

- Number of clients – gender, age
- Matched
- Unmatched
- Finished Match
- Ethnicity
- Specific Needs (eg. young carer, disability type)
- Type of accommodation and area
- Number of Volunteers (and a similar break down of this as in clients)
- Support sessions held
- Training Sessions held
- Volunteer enquiries
 - Where they heard about the service
- Length of time in match
- Reasons for leaving

D. Nitty-gritty Fundraising

Facilitated by Frances Young, Home Link

The aim in this workshop was to come up with a checklist of items essential to consider when creating a funding bid. In this way projects can create a pack of information that they can use when preparing a number of funding bids.

1. How do you prove a need for your project?

a) Gather information from:

- potential referrers to your project
- other organisations in the area about perception of need for your client group
- local / national statistics of relevance (quantitative information)
- case studies from you showing what has been achieved or what has been prevented (qualitative information)

b) Get information gathered independently e.g. from an independent evaluation

c) Link with local objectives:

Every local authority has objectives to achieve e.g. social inclusion/social justice objectives, lifelong learning, numbers of people engaged in voluntary activity.

Befriending projects could tie into these and meet the needs of the area. It is important to remember that befriending projects are seen as “multipliers”. A local authority might support them because they can then attract other charitable funding into the area.

2. How can you convince your funder of the benefits of your project to beneficiaries?

a) Beneficiaries: testimonials, videos, statistics (anonymised but which show the difference made to individuals), articles in newspapers, photographs (care needed in terms of confidentiality), follow-up of people previously befriended who have positive stories to tell.

b) Befrienders – as above. People giving evidence of gaining training opportunities, starting new careers, experiencing increase in self confidence/self esteems, providing means of giving back / active citizenship.

3. How will you convince a funder that you will benefit them?

- a) Do your homework – what are the funder’s objectives / what were they set up to do / what are they trying to achieve
- b) Talk to funders before submitting a bid. Experience in the group was that following a conversation one funder had said that they would “look out for the application coming in.”
- c) Consider assistance in developing your project / its fundraising skills e.g. through Lloyds TSB Capacity Building programme – this does a health-check on an organisation and can help to strengthen key areas. It can then lead to a more targeted Main Grants Lloyds TSB application

4. *What are the key back-up materials you should supply with a funding bid (even over and above what's been specified in the bid itself)? What's likely to impress?/What won't impress?*

- a) Annual report – this should be a selling point for a project each year and a way of the project impressing the outside world
- b) Map of the area you are working in – this had been important for some rural projects / can give evidence of need for travel expenses
- c) Thank you letter from families involved
- d) Accounts (independently examined)
- e) Business plan

Take care not to provide too much more than funders ask for. As with receiving applications when recruiting staff, it can be frustrating to get extra CVs and other information.

Business plans – experience of the group was that help can come from local enterprise companies, from business development staff within local authorities or from local CVS.

5. *How important is it to find out accurate costings for things you've never done before e.g. getting an independent evaluation of your project? Does "plucking figures out of thin air" ever work?*

- Participants had experiences of not covering all angles in applications e.g. putting in a salary increase but not the resulting increase in national insurance costs, missing out professional fees (accountants or payroll).
- If developing something new, highlight the flexibility that goes with it and the fact that you want to respond positively to changes that take place.
- Avoid fixed targets but note that you 'expect' certain numbers / "on average" things will be a certain level.
- Contingencies – round up figures not down to provide extra safety net.
- Base figures on genuine information so that you can defend them e.g. salary scales, level of administrative costs, rent (relating to properties in the area)