

Fundraising Toolkit 2

How to write a Fundraising Case
for Support



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United Kingdom
National Commission
for UNESCO



A fundraising case for support

The UK National Commission for UNESCO (UKNC) is developing a resilient network for UNESCO Designated Sites in the UK through our 'Local to Global' project, made possible with The National Lottery Heritage Fund, thanks to National Lottery players.

From 2023-2024, Local to Global convened UNESCO site coordinators and external consultants to generate a community of practice that promotes skills, confidence and capacity-building in the following key areas:

- Audience development, stakeholder mapping and inclusion
- Fundraising and financial sustainability
- Digital transformation and web development

UKNC commissioned Claire Glazebrook Consulting (www.claireglazebrook.com) to develop best practice guidance for UNESCO Sites in the UK in the field of fundraising and financial sustainability. This is one of four toolkits made available through the UKNC website.

Interested to know more?

Please contact the UK National Commission for UNESCO at www.unesco.org.uk

A fundraising case for support

Writing fundraising bids without the detail of what the money will be spent on is difficult. A fundraising case for support is a marketing tool which tells your story and sets out the facts about what makes your organisation and its work important. It outlines to supporters why you matter, what your work aims to deliver, and why they should support you. It effectively acts as a 'blueprint' and, once written and approved, can be tailored for communications and to write effective funding bids.

Your Case for Support should seek to answer the following questions:

History and Background

A summary to put your work into context.

- State your Vision, Mission and Key Objectives to achieve your overall goals as an organisation (refer to your Management Plan).
- What projects and services do you currently deliver?
- What are the benefits to your work and the impact you have on people and communities?
- How are you currently funded?
- What are your governance and staffing arrangements?

It can be good to include case studies or testimonials about your work to demonstrate impact and personalise what you do. Donors often respond to personal stories.

What do you want to do?

What do you need funding for now? A clear statement on how much and what it is for.

Background to the work

(i.e. why is it needed)?

- Wider context of your work (e.g. climate change, nature recovery).
- National context.
- Who will you be working with?
- Evidence of need (desk research and consultation amongst potential beneficiaries ideally with some level of co-production working with beneficiaries to shape the project).

Consultation might involve talking to your potential project partners, running some consultation sessions with your intended beneficiaries to demonstrate they value your work – you may also decide to involve them in designing your future delivery (called ‘co production’).

Consultation can also help to map what is already being done in your local area and whether your work hits touchpoints of regional or national strategies.

Why is your organisation best placed to meet the need and how you will do it?

- Is anyone else delivering similar work?
- List your track record of delivery.
- What is unique about your site?
- What makes you different?

Collaborating with other organisations can enhance projects – e.g. is there a community group working in your area that has expertise in the project you want to deliver? If they have a track record, it can be good to attract funding to collaborate.

What will happen if you don't get the funding?

- Is there a Plan B? (Demonstrating that you've thought about this is asked by many of the bigger funders to show the impact of not receiving support, helping to prioritise your funding bid).

Timeline and detail of delivery

(An action plan showing how you will achieve your outcomes).

Detailed budget

Your budget needs to show projected income and expenditure for each year you are requesting support.

- Can your existing team run the project or will you need to bring in additional expertise?
 - If you're employing new people, funders like to see people being paid a living wage and that salaries are benchmarked and also that you include recruitment costs, pension contribution, national insurance contribution).
- Similarly, ensure you cost expenses for any volunteers and subsistence to ensure they're well looked after and aren't out of pocket.
- Include realistic costings for everything. Do you need core funding (to cover overheads), project funding or capital funds (e.g. to buy equipment or maintain/renovate a building or site?)
- Consider full cost recovery (where a grant covers a proportionate share of your organisation's core costs and overheads). 10-15% of the cost of your project is realistic to ensure you cover costs such as utilities and insurance etc.
- Include inflation increases in your budget (or you will run short of funding after Year 1).
- How much income do you already have for the work?

Have you secured other grant funding, or are you investing your own reserves? If so, how much? Sometimes funders have maximum levels they'll put towards a project (e.g. a percentage) and guidelines on how much match funding you need to evidence. Lastly, make sure your budget is aligned with the narrative in any application.

How can you demonstrate value for money?

- Do you have the necessary **governing documents and policies** in place for your project to show you're a well-run organisation?

Check you have signed accounts to attach to funding bids and organisational bank accounts with a minimum of two signatories. Update your policies in GDPR, Safeguarding, Equality, Diversity and Inclusion, and Finance (inc a Reserves Policy).

Ensure you have procedures in place if working with vulnerable members of the community (e.g. that staff and volunteers undergo safeguarding training and DBS/ Disclosure Scotland, Access NI checks as a minimum).

Numbers of beneficiaries

- What are the numbers of beneficiaries to be reached? (Be specific).

Outcomes

- What are the outcomes you hope to deliver for beneficiaries?
- What is the change or difference your project will make?

Outcomes can be broad:

- **Will your project make the site more accessible (perhaps new interpretation will make it easier for audiences to engage with your work?)**
 - **Will the organisation be more resilient at the end of the project?**
 - **The project may unlock new audience groups (e.g. marginalised sections of community who won't have engaged before).**
 - **Will the project improve the condition of your heritage?**
 - **Can you demonstrate that the project will reduce your impact on the environment (through improved ways of working encouraging the use of public transport etc).**
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How will you evaluate success and share findings?

- What is the evaluation plan/framework/benchmarks?
- How will you demonstrate you have achieved the intended outcomes?
- How will you share the findings so others can learn (perhaps via UNESCO networks, an academic partnership, or at Government level if a national project)?

Evaluation is a systematic way of reflecting on and assessing the value of what you've done, the potential impact of the project, what worked well and what didn't work, how the project could be improved and the positive changes made.

You can measure success through a wide variety of methods. These range from quantitative data (e.g. how many people participated, number of events/activities etc) to qualitative methods to gauge changes in behaviour or positive changes.

The simplest of these is questionnaires for beneficiaries in the project. Sometimes video interviews/voxpops can be useful or gathering beneficiaries together in focus groups or asking them to keep personal logs. Observations of project partners, staff and volunteers are also useful.

You may wish to consider developing an Evaluation Framework to use throughout your project.

Long term sustainability.

- What are your plans for rolling out the work after the initial funding? i.e with investment, is the business model sustainable or will it perhaps get you to a position where you can apply for other more long-term funding? (Donors like to know they're not funding short term projects but something with longevity).

How can donors get involved?

- Make a clear ask.
 - What that level of funding will help you achieve?
 - How might you recognise a donor's contribution?
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Do you have a donor board at your site that lists donors? Many charities list supporters in their annual report and website. You could consider running a stewardship event so your supporters can see a project in progress, or when completed, or to meet beneficiaries.

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