

# Community Funding Toolkit

**Maximise your funding opportunities**



[Introduction >](#)

[Strengthening your Project >](#)

[Case Studies >](#)

# Introduction

Community organisations are delivering amazing projects across Argyll and the Islands, often led by volunteers who are working hard to raise the funding they need.

A recent survey that was carried out to inform this Toolkit, showed that applying for grants is the most common way that third sector organisations raise funding for their core costs, projects or to start something new.

Applying for grant funding isn't easy. It takes time and hard work but can be a very productive way of securing funds, if a good proportion of your grant applications are successful.

There is a great deal of competition for grant funding, so funders look for strong organisations with well planned projects that clearly show how they will make a positive difference. This Toolkit therefore focusses on what makes a strong project and organisation, supporting you to write successful funding applications. It will help you tell funders clearly and concisely why you should be awarded funding, giving them the information they need to be confident that your organisation is going to deliver the outcomes they want to achieve.



## **Introduction**

Checklist

Strengthening  
your Project

Case Studies

Useful Links

Grant funding opportunities range from small grants of around £500, up to major capital grants of over £1 million, with everything in between. This means application forms and processes vary from relatively short and simple, to complex and very time consuming, depending upon the amount of money you are looking for. This Toolkit aims to provide detail that is useful for large scale, capital and public sector grant applications, as well as smaller ones. Don't be overwhelmed if you are just looking for small amount of money to start with, you can pick and choose which sections are most relevant to you!

### **Small or seed corn funding**

If you haven't applied for grant funding before or are looking for a relatively small amount of money, the quick start summary link below will guide you through the things you need to think about and give you some useful tips.

[Quick Start guide >](#)

### **Core funding**

If you are looking for core funding for running your organisation then think of your whole organisation as a 'project' when you work through the Toolkit. This will help you to make sure you have everything covered and have a strong offer for a funding organisation.

### **Larger applications**

These will need time and patience, as funders must carefully assess whether you are offering them the best way of achieving the outcomes they want to buy. This Toolkit covers all the main areas likely to be of interest to larger and public sector funders, giving advice on how to approach them and potential areas of development to strengthen what you have to offer.

## **Introduction**

### Checklist

### Strengthening your Project

### Case Studies

### Useful Links



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# Checklist

## What a good project proposal looks like

1. Clear summary of what your project will achieve
2. Clear links with identified needs, and wider policies and strategies
3. Good support from a wide range of people and organisations (evidenced)
4. Clear aims, objectives, outputs and outcomes
5. Clearly thought through project delivery plan and realistic timescales
6. Clear capital costs, including professional fees, contingency and VAT
7. Financial tables to show projected income and expenditure
8. Evidence of risk awareness and good management
9. Relevant marketing to the right people
10. Realistic and well thought out funding strategy

All delivered by a strong organisation with good governance and clear policies and procedures.

Each one of these points is covered briefly in the following pages, with more information provided in links.

[Strengthening your project >](#)

[Introduction](#)

**[Checklist](#)**

[Strengthening  
your Project](#)

[Case Studies](#)

[Useful Links](#)

# Strengthening your project

## Contents

1. [Project summary >](#)
2. [Links with identified relevant strategies and community needs >](#)
3. [Community consultation and engagement >](#)
4. [Clarifying aims, objectives, outputs and outcomes >](#)
5. [Project delivery plan and timescales >](#)
6. [Evidenced capital cost estimates >](#)
7. [Income and expenditure estimates >](#)
8. [Identified areas of risk >](#)
9. [Marketing Your Project >](#)
10. [Clear strategy for raising the funding >](#)
11. [Business Plan >](#)
12. [Applying For Funding >](#)
13. [What funders look for in an organisation >](#)
14. [Other ways to raise funding >](#)

Introduction

Checklist

**Strengthening  
your Project**

Case Studies

Useful Links

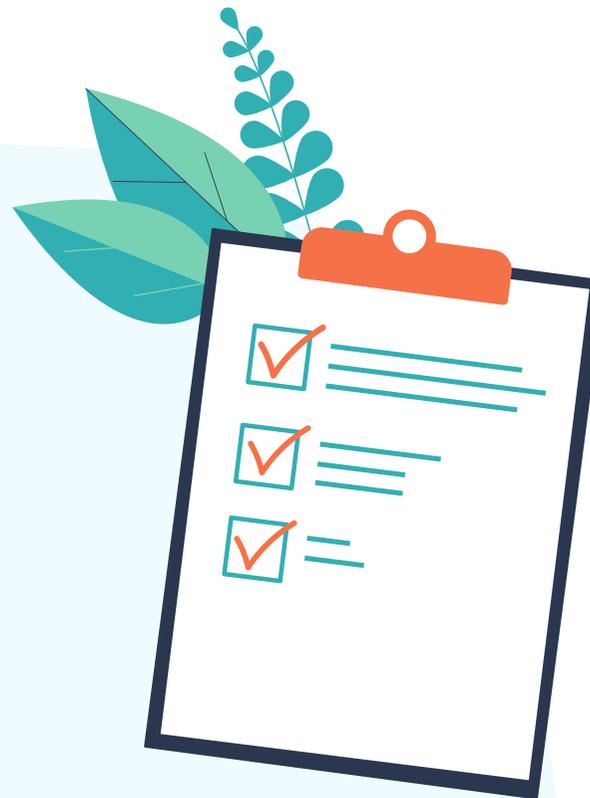


## 1. Project summary

It is useful to have a clear summary of your project that can be used as a start point for most funding applications. Keep sentences short and to the point. The aim is to get as much key information across in as few words as possible! See below for a quick guide to summary points.

### Quick guide to summary points

- ✓ **What** – what will your project do?
- ✓ **Where** – where is it based?
- ✓ **Why** – why is it needed?
- ✓ **How** – how does it fit with funder outcomes?
- ✓ **Who** – who will it help / who will be involved?
- ✓ **When** – when are you planning to start / finish / run
- ✓ **How** – how will it happen? Are you building a facility, employing staff, running an event?
- ✓ **What** – what will it achieve? What outcomes are you aiming for? What will the result be?
- ✓ **How much** – how much will it cost?



## Introduction

## Checklist

### Strengthening your Project

1. **Project summary**
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## 2. Links with identified relevant strategies and community needs

You will need to show how your project addresses relevant local and National Strategies to strengthen your funding applications. [Argyll and Bute Council](#) provides some useful links to help with this.

Two current cross cutting themes you will also need to take into consideration are:

### Net Zero

Scotland plans to reach net zero by 2045, with interim targets of 75% by 2030 and 90% by 2040. We're one of the first countries to set these ambitious targets and we can all play a part in leading the way in tackling the global climate emergency. Funders will be looking to see how your organisation and project is working towards these targets and addressing climate change in any way it can. This link will give you more information [About Net Zero](#).

### Fair Work

There will also be a stronger focus on the [Fair Work](#) Policy, with an expectation that organisations adhere to the five key aspects of providing fair working conditions for all.

Also, [The Place Principle](#) encourages better collaboration and community involvement to combine energy, resources and investment to increase the positive impact that can be achieved. Partnerships with other organisations are becoming more important, particularly as Councils and other public sector organisations need to work with communities to access funding and plan and deliver services.

The National Strategy for Economic Transformation has just been published by Scottish Government. This is a new 10 year Strategy which will set out how business and government will work together to create the best conditions for entrepreneurs to flourish. A National Challenge Competition, backed by £50 million of funding, will support projects with the greatest economic potential. Further information can be found here: [Scotland's National Strategy for Economic Transformation](#)

### Community needs

Many funders want to know that there is a clear **identified need** for your project. This means looking at relevant statistics for your area and showing clearly what the main needs are. For example, if you are developing a health project and the Scottish Index of Multiple Deprivation highlights that your area has a high score for poor health, then you would highlight the statistics and illustrate that the project you are proposing will have a positive impact on health.

[More info on strategies and needs >](#)

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. **Links with identified relevant strategies and community needs**
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

### 3. Community consultation and engagement

*'Bring the community with you.....sell your story and be passionate about what you offer'.*  
- The Rockfield Centre

Community consultation will be an important part of your project development. You will need to be able to evidence that you have held events and carried out surveys to find out what people want you to deliver and how you keep them informed. Ideally you will be able to show that you have been communicating with the community and other stakeholders about your project from the early stages of the idea, right up to finalising the project plans. You may also need to provide letters and comments of support.

[More information >](#)



## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
- 3. Community consultation and engagement**
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## 4. Clarifying aims, objectives, outputs and outcomes

Clarifying your aims and objectives at the outset and making sure that everyone involved is signed up to them, will help you to explain what your project is going to achieve to a wider audience.

The aim is a one liner that gives a flavour of what you are doing and for who. The objectives are then the key aspects that you will deliver to achieve your aim. They need to be tangible and measurable and will be linked directly to outputs and outcomes.

As you develop your project make sure that you stay true to your primary objectives. You may be able to highlight aspects of your work to fit with specific funder's requirements, but always keep a strong focus on the core of what you and your organisation cares about.

It is worth spending some time discussing your objectives, outputs and outcomes, to make sure that everyone involved in your project agrees what you want to achieve and can clearly see how to approach the project.

[Examples >](#)



## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
- 4. Clarifying aims, objectives, outputs and outcomes**
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

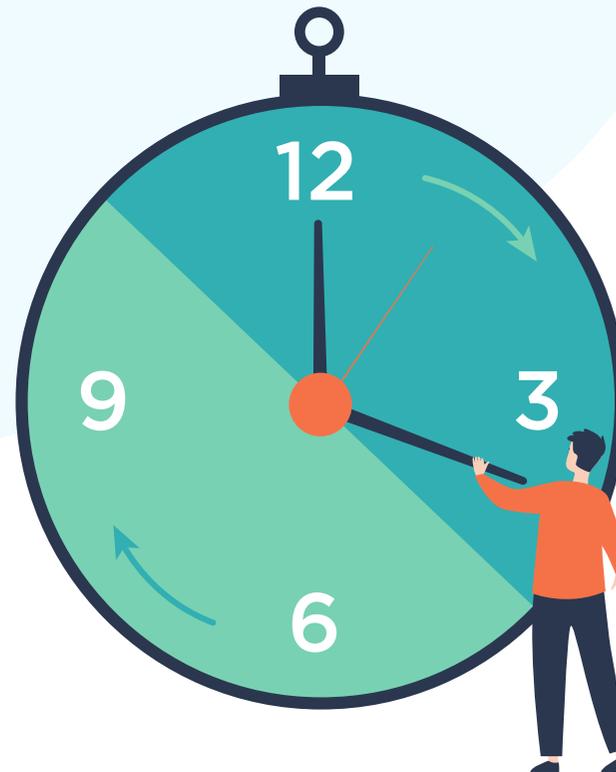
## Useful Links

## 5. Project delivery plan and timescales

The project delivery plan will capture everything that must be done to make the project happen and the order things need to be tackled in. It will also highlight any critical dates or timescales. Funders will expect to see that a clear plan has been thought through and that timescales for delivery are realistic.

The tasks will vary depending upon the project and could be quite simple for an event or activity programme for example. At the other end of the scale, an example of a high level delivery plan for an asset acquisition and build project is provided in the link below.

[Example >](#)



### Introduction

### Checklist

#### **Strengthening your Project**

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
- 5. Project delivery plan and timescales**
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

### Case Studies

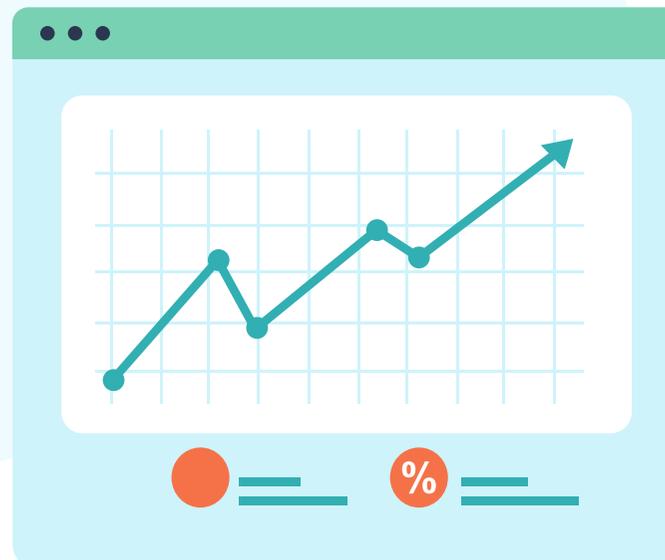
### Useful Links

## 6. Evidenced capital cost estimates

You need to research and present how much your project will cost. These figures will change as your project develops, but it is important to show that your early stage estimated costs are realistic as your funding applications will be based on them. Use a spreadsheet to show each cost, with a short explanation of how you arrived at each figure. Gather as much detail as you can for each cost line, using quotes and internet research. All this information may not need to be included in the application, but it will be invaluable if the funder comes back with questions, or later for claiming your grant.

### [Example cost table >](#)

You will also be expected to show a potential funding package at an early stage of the project. This needs to be based on your funding strategy and give a likely scenario for where the funding for the project will come from. It should be as realistic as possible and include local fundraising or borrowing if appropriate.



## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
- 6. Evidenced capital cost estimates**
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## 7. Income and expenditure estimates

As well as providing clear capital costs, you need to have considered how much it will cost to run the project in the short to medium term. For a small capital project, this may simply be highlighting that there will be a maintenance requirement and identifying how that will be carried out. For a larger project, it will require detailed estimates of income and expenditure over a number of years, to show that your proposals are financially sustainable in the long term.

An example of an income and expenditure table is provided in the link below.

[Example income and expenditure table >](#)



## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
- 7. Income and expenditure estimates**
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## 8. Identified areas of risk

It is useful to show funders that you have considered potential risks and how you will address them. The level of detail will depend upon the size of the project. It could be a simple table highlighting that accessing funding, timescales and capacity of the volunteer group may present a risk to the project. Alternatively, for a large multi-faceted project it may be a longer document covering a more complex set of issues.

[Examples >](#)



Introduction

Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
- 8. Identified areas of risk**
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

Case Studies

Useful Links

## 9. Marketing Your Project

Communicating what you are doing clearly to everyone that may be interested is vital to gaining support. Stakeholders - the people that you want to engage with and keep informed, can be divided up into groups that need different levels or types of communication. Think about who they are and what will work best for them (digital, social media, leaflets, face to face events?)

As well as general communication, you will also want to market your project specifically to funders and supporters. Be prepared to contact and meet with funding organisations and MSPs, local Councillors etc. and have a clear sales pitch or presentation ready.

An example of a Marketing Plan is provided in the link below.

[Example Marketing Plan >](#)



## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
- 9. Marketing Your Project**
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## 10. Clear strategy for raising the funding

Identify which key funders you will approach for funding at an early stage. There are many resources that provide information about current funding opportunities, although it does take time to research and find suitable grants to apply for.

You can ask for help with this from Argyll and Bute Council by emailing [thirdsectorenquiries@argyll-bute.gov.uk](mailto:thirdsectorenquiries@argyll-bute.gov.uk) or [communitydevelopment@argyll-bute.gov.uk](mailto:communitydevelopment@argyll-bute.gov.uk). Argyll and Bute Council also produces a comprehensive and very useful [Funding Alert](#) on a monthly basis and provides access to grant searches through [GRANTnet](#).

[Argyll and Bute TSI \(Third Sector Interface\)](#) also provides [Grants and Funding pages](#) and sends out a regular email highlighting funding opportunities if you join the mailing list. You can also speak to one of the four Third Sector Support Advisors at TSI who can help by critiquing funding applications and signposting to useful templates and policies.

[Foundation Scotland](#) is a central point worth checking, as it distributes grants from a wide range of Trusts and Community Funds.

A list of other funding guides and more information on planning your Funding Strategy can be found in the link below.

[Guides and strategies >](#)



## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
- 10. Clear strategy for raising the funding**
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## 11. Business Plan

It can be useful to draw all the information you have gathered together into a single Business Plan or similar document. This explains all aspects of your project and provides information about how your organisation functions. Some funders will ask for a copy of your Business Plan, and others will expect that you take relevant information from it to complete your application form. The Business Plan needs to be useful to you and your organisation and can be updated regularly as things change.

[Business Plan advice & template >](#)



## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
- 11. Business Plan**
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## 12. Applying For Funding

Once you have developed your project and identified which funders to apply to, you are ready to write and submit funding applications.

### Key writing points

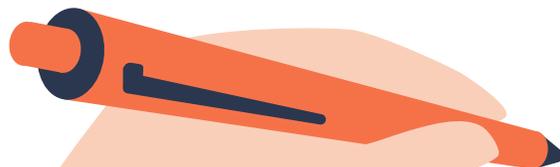
Click the link below for key points to follow when you are writing funding applications.

[Key points for applications >](#)

### When you are successful

You will need to keep the funders up to date with how your project is going. Click the link below for some points to help this go smoothly.

[Advice for when you are successful >](#)



Introduction

Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
- 12. Applying For Funding**
13. What funders look for in an organisation
14. Other ways to raise funding

Case Studies

Useful Links

## 13. What funders look for in an organisation

Funders are looking for a strong organisation when they are assessing funding applications. This means having a skilled Board or Committee and good governance in place.

### Board Skills

For this, it is useful to identify the skills needed to run your organisation effectively and to deliver specific projects. These can then be matched to the skills held by the Board. Ideally, your Board or Committee will have good representation across all skill areas required. Examples of skills to be found within a strong Board are given in the link below.

[Example Board skills >](#)

Good management of the organisation can be illustrated by showing that key skills are in place. You may identify skills gaps and want to recruit new Board Members to strengthen your Board.

### Good governance

Good governance of your organisation can be illustrated by showing that you are:

- Meeting regularly and making informed decisions, based on research and specialist information as required
- Keeping all reporting to OSCR/ Companies House up to date
- Having good policies, processes and procedures in place.

[More info on Policies and Procedures >](#)



## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
- 13. What funders look for in an organisation**
14. Other ways to raise funding

## Case Studies

## Useful Links

## 14. Other ways to raise funding

As well as applying for grants, there are other ways to raise funding including

### **Crowdfunding and Community Shares**

Raising funds online from peers and the wider community.

### **Social Investment**

Through recognised social investors.

### **Sponsorship**

Funding from specific businesses in return for promotion and publicity associated with your organisation.

### **Community Fundraising and Events**

Locally organised opportunities.

### **Pro bono work or donations from local companies**

Some companies have a requirements to fulfil for their Community Benefit Payback and so may be able to help you.



[More info on fundraising methods >](#)

## Introduction

## Checklist

### **Strengthening your Project**

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
- 14. Other ways to raise funding**

## Case Studies

## Useful Links

# Case studies

Following one to one interviews with key stakeholders across Argyll and the Islands, the following case studies have been provided to examine current practices and share learning.

[MACPool >](#)

[Scenic Sandbank >](#)

[The Rockfield Centre >](#)

[Mull & Iona Community Trust >](#)

[Friends of Hermitage Park /  
Helensburgh Community Hub >](#)

[Adventure Oban >](#)

**Introduction**

**Checklist**

**Strengthening  
your Project**

**Case Studies**

**Useful Links**

# Useful Links

## Other relevant guides and information

[Running your organisation – SCVO](#) – a wide range of relevant and helpful information

[Community-led Action Planning Argyll & Bute](#)

[www.mycommunity.org.uk](http://www.mycommunity.org.uk) – useful links and info on wider funding options

[Tools and resources](#) – Community Right to buy tools and guides

[Scottish Rural Network](#) – sharing rural development information, ideas and good practice

[Rural Social Enterprise Hub](#) – peer support network with a wide range of learning resources

Introduction

Checklist

Strengthening  
your Project

Case Studies

**Useful Links**

# Applying for small grants or seed corn funding

If you haven't applied for grant funding before, or are looking for a relatively small amount of money, here are a few tips to help you with a simple application process:

To apply for a grant you are likely to need:

- A constitution for your organisation. Some funders need you to be a charity, but not all, so you could just be a non-incorporated organisation. [SCVO](#) provides help with constitutions.
- A bank account in the name of the organisation and a recent bank statement.
- Contact details of at least two unrelated people from your organisation.

## Planning your project

The summary points given in the link below cover the information you will probably need when filling in a small application form. Work through these points and make sure you can answer them clearly before you start your application.

[Project summary points >](#)

## Writing a grant application form

The [National Lottery Community Fund Awards for All](#) online application process is a good example of a simple application form (you need to sign in to see the form). The main questions they ask are:

- What would you like to do?
- How does this meet our funding priorities?
- Who will benefit from the project?
- How will it involve your community?
- Give a break down of the costs and what money you are asking for.

The summary points you have worked through will help you to answer these questions clearly and include all the information they are looking for in your answers.

## Introduction

Checklist

Strengthening your Project

Case Studies

Useful Links

When writing your answers, bear these tips in mind:

- ✔ Read the application form questions and guidance carefully before you start!
- ✔ Make sure that your organisation and project is eligible for the grant
- ✔ Always fill in the application form provided, don't attach documents with information unless you are asked to.
- ✔ Check what documents are required and gather them all into one electronic folder. Check dates and signatures are all in place and correct (signed accounts for example).
- ✔ Aim to complete and send the application form well within the deadline if there is one.
- ✔ Clearly show how your project fits the grant priorities that are laid out. Make sure you highlight the elements of your project that might be of particular interest to the funder.
- ✔ Present your information clearly and succinctly in the application form using bullet points and short sentences.
- ✔ Draft out your answers first to help you work out which information is best presented under each question, trying not to repeat yourself.
- ✔ Make sure your costs are clearly listed and add up.
- ✔ Stick within the word counts provided. They will give you an indication of how much information the funder is expecting in your answer.
- ✔ Keep a copy of your application, paste text into a word document if it is an online form.
- ✔ Good governance
- ✔ Good governance of your organisation can be illustrated by showing that you are:
  - ✔ Meeting regularly and making informed decisions, based on research and specialist information as required
  - ✔ Keeping all reporting to OSCR/Companies House up to date
  - ✔ Having good policies, processes and procedures in place.

## **Introduction**

### Checklist

### Strengthening your Project

### Case Studies

### Useful Links

Specific current Scottish Government priorities that your project may address will also be important to highlight, for example:

### [Scotland's National Strategy for Economic Transformation](#)

- as a response to Net Zero and the Climate Emergency. An ambitious 10 year National Strategy will drive Scotland's economic transformation as the country recovers from the Coronavirus (COVID-19) pandemic and transitions to a net zero economy. This strategy guides the change and investment required to deliver greater, greener and fairer prosperity for Scotland over the next 10 years. Funders are likely to be looking to see how any project adheres to this strategy and is working towards greener and potential net zero delivery. SCVO also provides useful information: [How to start your organisation's journey to net zero.](#)

[Covid Recovery Strategy: for a fairer future](#) - if your project is linked to helping your community to address COVID recovery, then you will want to highlight how it fits with this strategy. It focuses on the efforts required to tackle inequality and disadvantage and will:

- address the systemic inequalities made worse by Covid.
- make progress towards a wellbeing economy.
- accelerate inclusive person-centred public services.

[Community wealth building](#) - this people centred approach re-directs wealth back into the local economy, as opposed to money leaving the area, and is a positive way for a project to illustrate how it supports the local community.

It does this through local procurement, fair employment and community and local ownership of assets, which all keep resources circulating in the local economy. Your project may be supporting this approach through community led growth or delivery of services such as tourism or care.

Articulating this in grant applications can strengthen your case and increase the positive outcomes you can illustrate.

Community Wealth Building Fits with Scottish Government [The Place Principle](#) which asks that all organisations responsible for providing services and looking after assets in a place, plan together to support inclusive and sustainable economic growth and create more successful places.

#### **The five principles of Community Wealth Building are:**

- Fair Employment and just labour markets
- Progressive procurement of goods and services
- Plural ownership of the economy
- Socially just use of land and property
- Making financial power work for local places.

More information can be found here: [Place-based approaches](#)

[UK Levelling Up](#) - The UK Levelling Up agenda may provide funding opportunities for remote, rural and island communities in the future.

- boosting productivity, pay, jobs and living standards by growing the private sector, especially in those places where they are lagging
- spreading opportunities and improving public services, especially in those places where they are weakest
- restoring a sense of community, local pride and belonging, especially in those places where they have been lost
- empowering local leaders and communities, especially in those places lacking local agency.

## Introduction

## Checklist

### **Strengthening your Project**

1. Project summary
2. **Links with identified relevant strategies and community needs**
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

You will also need to identify the local and national strategies that are relevant to your project and show how your project outcomes help to address them. Examples include:

- Each Council will have an '**Outcome Improvement Plan**' or similar (previously called Single Outcome Agreements).
- There are also likely to be **Community Plans** or other community based consultation which highlight the key areas for improvement in an area.

## Nationally

[Scotland's National Outcomes](#) - that people in Scotland:

- grow up loved, safe and respected so that they realise their full potential
- live in communities that are inclusive, empowered, resilient and safe
- are creative and their vibrant and diverse cultures are expressed and enjoyed widely
- have a globally competitive, entrepreneurial, inclusive and sustainable economy
- are well educated, skilled and able to contribute to society
- value, enjoy, protect and enhance their environment
- have thriving and innovative businesses, with quality jobs and fair work for everyone
- are healthy and active
- respect, protect and fulfil human rights and live free from discrimination
- are open, connected and make a positive contribution internationally
- tackle poverty by sharing opportunities, wealth and power more equally

**Subject specific strategy examples:**

- **Community Land Scotland** clearly articulates the rationale for communities purchasing assets
- **The Scottish Government Health Policy (2017)** recognises that encouraging people to be more active could help prevent and treat more than 20 chronic diseases, increase life expectancy and reduce pressure on the NHS.
- The **Social Isolation and Loneliness Review by Age UK**, illustrates that group activities are particularly useful in helping older people out of loneliness and isolation
- **Scotland's Social Enterprise Strategy 2016-2026** promotes organisations working towards income generation and sustainability.

**Links to useful statistics include:**

[SIMD \(Scottish Index of Multiple Deprivation\) Statistics | National Records of Scotland](#)

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. **Links with identified relevant strategies and community needs**
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## More info on community consultation and engagement

If you are developing services, then finding out what people want and whether there is market for what you are proposing, will help you to show that your proposals are viable. You need to know who will use your services, and also you could ask how much people will pay for what you intend to deliver. If you are planning a capital build project, then your architect or landscape architect will be able to help consult widely on the options you are considering. The findings from this consultation will help you to evidence local support for your project, using statistics and quotes from your research. It will also evidence markets and potential income streams.

You will benefit from providing updated information to the wider community regularly. Consider using social media, local drop in events, leaflets, newspaper articles and a website to make sure everyone is engaged with the process. You may also want to gather letters and comments of support from the local community and relevant stakeholders such as key partner organisations and politicians.

### Introduction

### Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
- 3. Community consultation and engagement**
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

### Case Studies

### Useful Links

## Examples of clarifying aims, objectives, outputs and outcomes

An aim is a concise statement which summarises what your project will achieve overall.

For example:

*‘Creating a safe and welcoming space for young people to meet and learn new skills’*  
*‘Developing a series of new walking and cycling trails for community and visitor use.’*  
*‘Exploring creative and sustainable approaches to supporting people with dementia.’*

Objectives give more detail and link to the outputs and outcomes you want to achieve, for example:

| Objective  | Outputs   | Outcomes  |
|--|---|---|
| Delivering workshops and training events year round  | 10 skills workshops run per year<br>120 people attending workshops<br>5 training events covering creative skills for young people annually<br>100 people attending events | Increased skills evidenced by the young people attending the project<br><br>Increased numbers of people engaging with skills training and stating that they have benefitted from the project. |
| Running a successful Volunteer Programme   | 20 new volunteers recruited and trained annually  | Increased opportunities for training and social engagement for a wide range of volunteers.  |
| Providing accessible, affordable and welcoming health and well-being activities, with a focus upon inclusivity and engagement with the hardest to reach groups and individuals | 500 people accessing health and well being activities, including 100 from the hardest to reach groups   | People accessing the project state that they have improved health and well being  |
| Deliver a high quality community owned asset for the benefit of the community  | Building purchased and renovated successfully.  | Sustainable building owned and managed by the community to provide required services<br>Strong community cohesion, pride and sense of place.  |
| Employ and manage a staff team to deliver the project effectively  | 3 new full time equivalent jobs provided at the Living Wage   | Increased employment opportunities locally  |

The outputs and outcomes can be monitored, measured and reported on, to show what you are delivering.

You may want to show your objectives, or other text about your project as a word cloud - [WordClouds.com](https://www.wordclouds.com/)

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
- 4. Clarifying aims, objectives, outputs and outcomes**
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

# Initial Delivery Plan for an asset acquisition and build project

| ACTIVITY   | Month       |
|--|-------------|
| Community and stakeholder consultation and engagement  | Month 1     |
| Develop early stage Business Plan  | Month 3     |
| Apply for funding to purchase building (e.g. Scottish Land Fund)   | Month 6     |
| Secure funding required for building purchase  | Month 12    |
| Purchase building  | Month 15    |
| Finalise legal requirements for purchase   | Month 15    |
| Apply for development funding (e.g. for architect fees)  | Month 16    |
| Write a brief for an architect to carry out the design work for the redevelopment  | Month 16    |
| Secure development funding   | Month 19    |
| Procure an architect (will require clear procurement process if grant funded)*   | Month 21    |
| Appoint architect and work with them to design the redevelopment (likely to require further consultation and an options appraisal)                     | Month 22    |
| Apply for planning permission (via the architect)  | Month 24    |
| Clarify and apply for all other statutory permissions required (e.g. SEPA, archaeology)  | Month 24    |
| Develop a funding strategy for the redevelopment project and make early stage contacts   | Month 24    |
| Update the Business Plan to include the options appraisal, designs and indicative costs for the redevelopment  | Month 24-26 |
| Planning permission received   | Month 26    |
| Write and submit funding applications for the redevelopment capital build  | Month 26-30 |
| Construction Drawings to Building Warrant Standard   | Month 26-30 |
| Apply for Building Warrant (via architect)   | Month 30    |
| Capital build funding secured  | Month 30-34 |
| Work with architect to develop tender documents for capital build  | Month 34-36 |
| Procure construction company through Public Contracts Scotland   | Month 36-39 |
| Appoint construction company   | Month 39    |
| Construction commences   | Month 40    |
| Construction of build (detailed delivery plan to be developed with construction company, ensuring all client requirements tied on to the overall plan) | Month 40-50 |
| Project management of build, including financial management, claims and liaison with all funders   | Month 40-50 |
| Monitoring and Final Reports for all funders   | Month 45-60 |

\*Procurement of services or goods to be paid for by grant funding needs to be carried out carefully to ensure that all requirements are met, through Public Contracts Scotland for example. See the section below for more information.

The timescales you provide for each stage of the process at this stage will be indicative and likely to move as a project develops. However, it is useful to have a draft programme to capture all the key elements and activities, including statutory requirements such as planning permission and building warrants and relevant timescales.

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
- 5. Project delivery plan and timescales**
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## Example cost table

Depending upon the project and funders, you are likely to be required to provide three quotes for capital items and works. For a small project, this could be done by researching the cost of play equipment online and by asking three local tradesmen for a price to fit the equipment for example.

### Small Projects

A simple costs table may look something like this:

| Capital cost estimates (all costs inc VAT) | Capital inc VAT | Source                         |
|--|-----------------|--------------------------------|
| Groundworks (foundations and landscaping)  | £20,000         | three quotes from local trades |
| Play equipment purchase                    | £15,000         | website links                  |
| Play equipment delivery                    | £1,000          | website link                   |
| Planning fee                               | £500            | Council link                   |
| Fitting play equipment                     | £2,500          | three quotes from local trades |
| <b>Subtotal</b>                            | <b>£39,000</b>  |                                |
| Contingency (usually 10-15%)               | £3,900          |                                |
| <b>Total capital costs</b>                 | <b>£42,900</b>  |                                |

### Larger Capital Projects

A larger project will require a clear specification for construction and a full tender process. The first step would be to tender for an architect, so your project would need to be phased to fundraise for and appoint the architect in the first instance. Once appointed, the architect would then develop the clear tender brief and Quantity Surveyor (QS) estimates for the construction work, which would in turn be tendered to secure three quotes from construction companies. This process is laid out in the project plan in section 4 above.

You need to be clear whether costs include VAT or not, and the VAT status of your organisation must be stated. For capital projects, independent VAT advice will be needed to establish what VAT can potentially be reclaimed. You will also need to allow for professional fees and contingency once you have an initial capital cost for the work from a construction company.

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
- 6. Evidenced capital cost estimates**
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
- 6. Evidenced capital cost estimates**
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

An early-stage capital costs table for a larger capital project may look something like this:

| Capital costs (provided by Architect and QS)        | Cost              | VAT             | Source    |
|---|-------------------|-----------------|-----------|
| Capital works - prelims                             | £50,000           | £10,000         | QS        |
| Capital works - groundworks                         | £200,000          | £40,000         | QS        |
| Capital works - construction                        | £750,000          | £150,000        | QS        |
| Services  | £30,000           | £6,000          | QS        |
| Planning  | £2,000            | £400            | Council   |
| Building Warrant                                    | £1,500            | £300            | Council   |
| Professional fees (architect and QS RIBA 3 onwards) | £80,000           | £16,000         | Architect |
| <b>Subtotal</b>                                     | <b>£1,113,500</b> | <b>£222,700</b> |           |
| Contingency 10%                                     | £111,350          | £22,270         |           |
| <b>Total</b>  | <b>£1,224,850</b> | <b>£244,970</b> |           |

For funders, the more detail and evidence you can provide around costs the more credible your project will be. QS estimates are appropriate for initial capital funding applications. All capital costs would then be updated once three construction tenders were received against the full specification for the build.

## Example Income and Expenditure table

Each line of this table would be informed by detailed market research or previous costs and desk research which could be evidenced if requested.

| Income                      | Yr 1           | Yr 2           | Yr 3           | Yr 4           | Yr 5           |
|-----------------------------|----------------|----------------|----------------|----------------|----------------|
| Courses and training income | £30,000        | £30,900        | £31,827        | £32,782        | £33,765        |
| Retail sales                | £5,000         | £5,150         | £5,305         | £5,464         | £5,628         |
| Room rental                 | £4,000         | £4,120         | £4,244         | £4,371         | £4,502         |
| Donations and legacies      | £1,000         | £1,030         | £1,061         | £1,093         | £1,126         |
| Estimated Grant funding     | £5,000         | £4,000         | £3,000         | £2,000         | £1,000         |
| <b>Total Income</b>         | <b>£45,000</b> | <b>£45,200</b> | <b>£45,436</b> | <b>£45,709</b> | <b>£46,020</b> |

| Costs                          | Yr 1           | Yr 2           | Yr 3           | Yr 4           | Yr 5           |
|--------------------------------|----------------|----------------|----------------|----------------|----------------|
| Core wages inc oncosts         | £25,000        | £25,750        | £26,523        | £27,318        | £28,138        |
| Electricity                    | £1,500         | £1,545         | £1,591         | £1,639         | £1,688         |
| Insurance                      | £1,000         | £1,030         | £1,061         | £1,093         | £1,126         |
| Repairs and maintenance        | £1,500         | £1,545         | £1,591         | £1,639         | £1,688         |
| Telephone and Internet         | £2,000         | £2,060         | £2,122         | £2,185         | £2,185         |
| Professional fees (accountant) | £750           | £773           | £796           | £820           | £820           |
| Stationery/sundries            | £1,500         | £1,545         | £1,591         | £1,639         | £1,639         |
| <b>Total Costs</b>             | <b>£43,500</b> | <b>£43,655</b> | <b>£43,845</b> | <b>£44,070</b> | <b>£44,381</b> |

|                              |        |        |        |        |        |
|------------------------------|--------|--------|--------|--------|--------|
| <b>Overall surplus/ loss</b> | £1,500 | £1,545 | £1,591 | £1,639 | £1,639 |
| <b>Cashflow</b>              | £1,500 | £3,045 | £4,636 | £6,275 | £7,915 |

### Notes

Annual 3% increment added

All figures based on previous accounts and market research

Estimated earned income will need to be based on market research and clear rationales illustrating how the numbers were arrived at (x customers per week paying x for a coffee for example). Costs will need to be researched and best estimates arrived at by looking at similar projects and premises.

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
- 7. Income and expenditure estimates**
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## Simple Risk Table

### Small Projects

For a small project, a simple risk table should be sufficient:

| Risk                                       | Mitigating Action   | Responsible / timescale             |
|--|---|-------------------------------------|
| Not able to secure funding for the project | Develop a strong project and funding strategy and write comprehensive funding applications      | Project group. Ongoing              |
| Timescale for delivery of equipment slips  | Order equipment as soon as funding is secured. Manage expectations for project completion date. | Project group. Once funding secured |
| Volunteer fatigue                          | Recruit a number of volunteers to oversee project, so work is shared out between them           | Project group. Ongoing              |

### Larger Projects

Larger or more complex projects could require a detailed risks table like the one shown [here](#)

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
- 8. Identified areas of risk**
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## Outline Marketing Plan

The following outline gives headings and a structure for a marketing plan. Although writing a marketing plan is often seen as an unnecessary, time-consuming process, it can be used as a working document to help you reach your objectives - including your funding goals by providing useful groundwork prior to preparing a funding strategy and when talking to potential funders. It will help you articulate a strategy for promoting your organisation / product / service, providing insights into your market and your audience (and how to engage with them). It also ensures everyone in your organisation is on the same page and knows what the common goals are, helping it to operate more efficiently.

### Executive summary

This should be written after the main body of the plan has been produced. It will summarise the plan's main points, elements and conclusions, enabling the reader to read the main headlines quickly at the outset.

### Introduction

Explain your organisation, giving a brief background of its history to date and what your marketing plan will achieve.

### Research / methodology

- Carry out desk research to find any existing documentation which will help you evaluate what your audience is likely to want (ie best way of them accessing it, likely buying habits, trends in your market etc). Look up organisations that carry out similar work to yourself on the internet and understand what they provide and how they promote it. Are there any 'competitor' organisations that might be operating in the same marketplace, vicinity or with a similar audience? Make sure you differentiate yourself and provide something different (eg think of a Unique Selling Point: USP).

- Speak to potential customers / service users etc. What do they want / need? How much would they be willing to pay? How would they like to access what you are offering?

### A SWOT Analysis

This will guide you to build on what you do well, address what you're lacking, seize new openings, and minimize risks. Carrying out a SWOT Analysis will help to assess your organisation's position before you decide on any new strategy / plan.

### Define your target audience

Who are you aiming your product / service at?

### Objectives of your marketing plan

Examples of objectives are:

- to have a defined path to obtain new customers/service users,
- strengthen relationships with current customers and clients,
- increase sales/usage, improve retention,
- increase brand awareness

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
- 9. Marketing Your Project**
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## Tools

These might include:

- your branding / logo – do you have a logo/branding device which gives your organisation a professional, unified appearance? Can it be improved?
- your website – is likely to be the first port of call for existing and potential customers / service users to look at what you do. Does it give up to date and relevant information? Does it portray the right image of you?
- Social media – like your website, many potential and existing customers / service users will form opinions of your organisation through social media; it is a cost effective and relatively easy way of accessing a target market, giving information and impressions of your organisation to your audience. Regular, interesting posts will enable you to access as many people as possible. Unlike advertising, social media is ‘free’ and can be very targeted and effective.
- PR – do you have contacts at your local paper? Find out who the local journalists are and develop a relationship with them. Most local papers are keen to support third sector organisations.

## Timetable

It is helpful to create a simple timeline to organise your projects and provide a clear structure, usually making things look more straightforward and not as daunting! An example of a simple timetable is:

| Activity / Week Commencing            | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 |
|---------------------------------------|---------|---------|---------|---------|---------|---------|
| Create new logo                       |         |         |         |         |         |         |
| Update website                        |         |         |         |         |         |         |
| Create social media calendar/schedule |         |         |         |         |         |         |
| Regular social media posts            |         |         |         |         |         |         |
| Contact local press                   |         |         |         |         |         |         |
| Open day                              |         |         |         |         |         |         |

## Budget

Most of the above tools can be undertaken extremely cost effectively, but if you anticipate costs it is important to obtain quotes for any work and devise a budget so there are no unexpected surprises. It is worth remembering that many companies will undertake pro bono work in some of the areas outlined above, to help them achieve Community Benefit Payback.

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
- 9. Marketing Your Project**
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

# Developing your Funding Strategy

Work through funding opportunities systematically and check that your project and your organisation fit the eligibility criteria in the first instance. Does the fund cover capital or revenue costs? Is your project activity listed as something that will be funded, or a focus for the grant? Are there specific areas of activity that the funder is looking for such as training or environmental outcomes. List all the funders that you are likely to be able to apply to, based on eligibility criteria.

Each funder will have a set of requirements that you will need to take into account as you work out which order to approach them in. For example, some require match funding to be in place, others will have specific requirements about spending grant money in a set time. A spreadsheet with potential funders, deadlines, requirements and amount to apply for is a useful tool to gather all your research into one place. This can also be updated as you progress each application, and even colour coded when you are successful, for example:

| Funder                 | Requirements   | Progress notes                                      | Amount  |
|------------------------|--|---|---------|
| Hugh Fraser Foundation | Email application and latest accounts.<br><a href="mailto:hughfraserfoundation@turcanconnell.com">hughfraserfoundation@turcanconnell.com</a> | Applied 15-03-22                                    | £3,000  |
| Viridor                | 100K max project. Closing date 30th April submit a stage 1 application first require specification and quotes.                               | Wait for quotes before applying                     | £15,000 |
| Awards for All         | Max £10k. Can apply at any time. Project fits criteria well.   | Apply before Sport Scotland to secure match funding | £9,500  |
| Sport Scotland         | Requires match funding. Three quotes needed.   | Wait for match funding to be secured                | £10,000 |

The actions from the table above are: Secure specification and quotes, then apply to Awards for All, then Viridor and finally Sport Scotland, once match funding is secured.

You will need to apply for more funding than you need, as a good project will only secure approximately 50% of the funding it applies for.

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
- 10. Clear strategy for raising the funding**
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

More complex projects may require planning permission to be in place, or full business plans to be provided before applications are made, so this needs to be taken into consideration when project timing is planned at the outset.

Where possible, make contact with the funding organisation at an early stage and establish a relationship with a single point of contact if appropriate. This will help as you discuss project details and develop your application.

Most funders will ask for key documents including your constitution, accounts and a recent bank statement, so it is useful to have those on hand in a folder, ready to attach to applications.

Do not underestimate the time it will take to research funding opportunities, develop a strategy and then write funding applications. Aim to draw in help where you can (e.g. Argyll and Bute Council and the TSI) as well as volunteers to collate information and put together applications.

## Funding Table

You will be expected to show a potential funding package at an early stage of the project. This needs to be based on your funding strategy and give a likely scenario for where the funding for the project will come from. It should be as realistic as possible and include local fundraising or borrowing if appropriate.

This funding table will change as you apply for and secure grants, so will need to be updated regularly. As you secure grants you will be able to consider when claims can be made from each funder, which will highlight whether you are likely to have a cashflow issues. Some funders will pay out a grant up front and others will pay when you show an invoice that needs to be paid, so you can claim the funding before paying the bill. However, many funders require evidence of spend before they will release the grant, and therefore the bill needs to be paid and then the claim made. There can also be a time delay in payment of the grant, so cashflow must be carefully considered.

The funding table will need to be updated regularly and grant claim requirements noted as these will inform any potential cashflow issues for the project.

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
- 10. Clear strategy for raising the funding**
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## Business Plan template

There are many templates and advice documents about producing a business plan.

### **SCVO**

SCVO provides very useful information here: [Business planning](#)

### **Business Gateway**

As does Business Gateway: [Starting a business](#)

## Introduction

## Checklist

### **Strengthening your Project**

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
- 11. Business Plan**
12. Applying For Funding
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## Key points to follow

### When you are writing funding applications:

- ✔ *Read the application form and guidance and questions carefully!* Many funders have specific expectations regarding the way in which information is provided and what you cover. Most will expect that you complete their specific application form rather than attaching generic documents.
- ✔ Make sure that your organisation and project is eligible for the funding that you are applying for.
- ✔ Check what accompanying documents are required and gather them all into one electronic folder in good time. Check dates and signatures are all in place and correct (signed accounts for example).
- ✔ Aim to complete and send the application form well within the deadline, allowing for last minute information or internet issues.
- ✔ Make sure your project is eligible and focus the application on the grant requirements by clearly showing how your project fits the grant priorities that are laid out. This doesn't mean changing the project to suit the funding, as that will skew what you deliver away from your original aims. However, you can make sure you highlight the elements of your project which might be of particular interest to the funder.
- ✔ Research what the funders want to focus on - some are looking for key words/projects – try to incorporate this into your applications.
- ✔ Make contact with a grants officer in the funding organisation if appropriate, giving you the opportunity to chat through the project and check any details about the application. Try to get them to visit your project and build personal relationships.
- ✔ Present your information clearly and succinctly in the application form. Focus your answers specifically on the questions asked and provide clear concise information – bullet points and short sentences. Your aim is to explain as much as you can about your project by carefully answering the questions so that the funder receives the exact information required in the order they expect.

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
- 12. Applying For Funding**
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

- ✔ Draft out your answers first to help you work out which information is best presented under each question, trying not to repeat yourself.
- ✔ Keep a copy in a word document if it is an online form.
- ✔ Stick within the word counts provided. They will give you an indication of how much information the funder is expecting in your answer.
- ✔ Prepare a clear spreadsheet for your costs and budget lines, with an explanation of how you came to each figure and the total. Gather as much detail as you can for each cost line, with quotes and internet research. All this information may not be included in the application, but it will be invaluable if the funder comes back with questions, or later for claiming your grant. Keep a note of any calculations you make to complete the application form lines accurately.
- ✔ Work out how your project will be sustainable in the medium to long term. Explain to funders what your plans are and highlight how they can help.
- ✔ Ask someone who doesn't know the project or organisation well to read your application to check it explains everything clearly and they understand what you are asking for.
- ✔ You are likely to need to attach evidence for your estimated project costs e.g. three quotes or price comparisons at application stage. (NB – when you claim you are also likely to be required to provide evidence of the actual purchase costs using the invoices you pay out against, see below).
- ✔ Keep evidence of when you sent the application to the funder and ask for an acknowledgement.
- ✔ Keep a note of when you can expect a response.

## Introduction

## Checklist

### **Strengthening your Project**

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
- 12. Applying For Funding**
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## When you are successful

### Keeping funders up to date with the project:

- ✔ Keep a spreadsheet to record which grants you have secured, read all terms and conditions carefully and note all the requirements of the funder. These may be split into claims, publicity and legal. Having a document which you can refer to quickly to see what is required when will be helpful as you start to deliver the project and claim the funding.
- ✔ Some funders will pay against invoices (before you have paid them), whereas most will need to see evidence that you have paid the invoice (e.g. a receipt or bank statement). You are likely to be required to provide evidence of the actual quotes received when you purchase goods and the invoices you pay out against as part of your procurement evidence. Check the requirements carefully and make sure you have the correct documents to include with your claim.
- ✔ The time that a funder will take to pay out against a claim can vary from a week to a month or more. This could be crucial to your cashflow, which you will need to monitor carefully. Set up a spreadsheet to monitor your expected project spend against expected grant money into your account and identify any areas where you may require a loan to cover cashflow, or make arrangements to mitigate the issue.
- ✔ Keep your funder informed of project progress on a regular basis. Some will request monthly or quarterly update reports or meetings. Others will require a project completion report. Be honest if project delivery progress isn't as planned – it rarely is. Expect changes and keep your funder informed.
- ✔ Be aware of the timescales for claiming all funding and update your funder if you are likely to need more time to claim in full. Some funders will have absolute deadlines for claiming funding which must be adhered to. Be sure to know these and work to them.
- ✔ You will need to set up monitoring systems for required outcomes of the grants once the project is delivered.
- ✔ Make sure you know the document retention requirements for the grant (including format eg digital or original)

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
- 12. Applying For Funding**
13. What funders look for in an organisation
14. Other ways to raise funding

## Case Studies

## Useful Links

## Examples of Board Member Skills

### Governance

- Knowledge of roles and responsibilities of a Board
- OSCR reporting requirements
- Companies House reporting requirements
- Strategic planning
- Meeting management (plan meetings regularly, chairing, minutes)

### Finance

- Financial management
- Budgeting
- Grant applications – submission and monitoring
- Community fundraising
- Administration/bookkeeping
- Liaising with accountants

### People Management

- Volunteer recruitment and management
- Staff recruitment and management
- Work planning
- Training
- Working with vulnerable people
- Disclosure certification

### Communication

- Liaising with Stakeholders
- Website and social media
- Marketing and promotion
- Community engagement
- Partnership development and management

### Operations

- Health and safety
- Work planning
- Contract management

### Project specific skills may include:

- Building and facilities management
- Health and well being
- Working with young or older people
- Events management
- Café/retail management

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
- 13. What funders look for in an organisation**
14. Other ways to raise funding

## Case Studies

## Useful Links

## Recruiting Board Members

Once you have identified what other skills would be useful for your organisation, you may want to recruit new Board members to fill them. You can proactively target different age groups or skills that you would like to recruit. Think outside the box when recruiting new people to volunteer. What will attract a wider range of people to join your organisation and help to achieve positive impacts for your community? How can you show them that your organisations is really making a difference?

Recruitment is often best done through word of mouth, by identifying and speaking to people who can bring the skills you need. A personal approach to an individual, highlighting exactly why you would like them to join you is likely to appeal to someone more than a generic advert or request.

However, if you need to cast the net wide, an advert with a clear Board Member role description can be productive. Explain briefly what your organisation does, why it is important and what skills you are looking for in particular. Include website or social media links and give contact details of someone currently on the Board for people to speak to.

### Board Mentoring

Another route forward is to find some Board Mentoring for your existing Board Members. This could take the form of some bespoke training, or a one to one conversation with an experienced professional on a regular basis.

Organisations that can help you find Board mentors include:

- **Business Mentoring** – This service is run by the Scottish Chamber of Commerce and is open to any established Scottish businesses and social enterprises with a steady turnover.
- There is more information about finding a mentor here: [The School for Social Entrepreneurs](#).
- Alternatively, you may find someone locally as you look to recruit Board Members, that can not commit to being on your Board, but is happy to support and mentor.

## Introduction

### Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
- 13. What funders look for in an organisation**
14. Other ways to raise funding

### Case Studies

### Useful Links

## Policies and procedures

Written policies and procedures will help an organisation to run day to day operations. They make sure everyone knows and adheres to relevant laws and regulations, and keep internal processes simple and systematic, so everyone does things in the same way where it matters.

Policies tend to cover regulations that need to be met and put in place internal structures so that everyone, Board, staff and volunteers, knows what is expected and how things will be done. They can include policies on:

- Complaints
- Conflict of interest
- Assets
- Data and GDPR
- Equality and diversity
- Financial control
- Home and lone working
- Recruitment
- Volunteering
- Health and Safety
- Food and Hygiene

### Some examples of template policies

Procedures are also useful written down, so everyone knows how to do things. They may cover things that are useful for people to know like maintenance of a building or piece of equipment, financial processes such as approval of spend or ordering, booking systems or induction of volunteers.

## Introduction

## Checklist

### **Strengthening your Project**

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
- 13. What funders look for in an organisation**
14. Other ways to raise funding

## Case Studies

## Useful Links

## More info on other ways to raise funding

### Crowdfunding models

- **Donation based** – small donations with no reward system. Traditional donations gathered through an online system. E.g. [Indiegogo](#), [JustGiving](#), [GoFundMe](#)
- **Rewards based** – the social enterprise gives rewards to its backers. Platforms include: [Kickstarter](#), [Crowdfunder UK](#)
- **Equity based** – sell shares in your company to raise capital. It is Complex and regulated. See: [crowdcube](#), [Community Shares Scotland](#) and [DTAS](#) provide information and support for community organisations wishing to investigate this option. Specific legal structures are required to enable community organisations to issue shares to raise funds. E.g. a Community Benefit Society
- **Lending Based** - peer to peer and peer to business lending. E.g. [LendingCrowd](#)

### Social Investment loans

Lending organised through recognised social investors which may be more open to patient capital or longer pay back terms than traditional banks. Your organisation will need to be investment ready and able to show that you can pay back the loan and meet the terms and conditions. E.g. [Social Investment Scotland](#), and [Triodos Bank](#)

### Sponsorship

Funding from specific businesses in return for promotion and publicity associated with your organisation. Identify local or relevant businesses to form working relationships with and approach them with a clearly laid out proposition for sponsorship. How much money are you requesting annually and what will you offer their company in return?

### Community Fundraising and Events

Locally organised activities with an entrance fee, raffle, silent auction, race night or other opportunities to encourage people to attend and pay for activities, in order to raise funds.

## Introduction

## Checklist

### Strengthening your Project

1. Project summary
2. Links with identified relevant strategies and community needs
3. Community consultation and engagement
4. Clarifying aims, objectives, outputs and outcomes
5. Project delivery plan and timescales
6. Evidenced capital cost estimates
7. Income and expenditure estimates
8. Identified areas of risk
9. Marketing Your Project
10. Clear strategy for raising the funding
11. Business Plan
12. Applying For Funding
13. What funders look for in an organisation
- 14. Other ways to raise funding**

## Case Studies

## Useful Links



|                             |  |
|-----------------------------|--|
| <b>Background</b>           | MACPool is a Social Enterprise based in Lochgilphead that provides indoor swimming for the community of Mid Argyll.  |
| <b>Specific Projects</b>    | MACPool embarked on a major capital redevelopment project in 2018 so that it could deliver more services to the community and increase its income streams, making it more resilient in the long term. The project is now in the final stages of build and the pool will be re-opening in Spring 2022 as MACPool Activity Hub, including a café, softplay, activity rooms, a Changing Place and an improved changing village.   |
| <b>Main Funding Avenues</b> | <p>MACPool generates approximately 60% of its income from sales and has a Service Level Agreement with Argyll and Bute Council for the provision of school swimming.</p> <p>For the capital redevelopment project, Scottish Land Fund supported the purchase of the adjoining building – a year long two stage process which required a business plan.</p> <p>The funding strategy for the capital redevelopment project included over ten funders. We started to apply for the main capital project funding in July 2019, approaching National Lottery first, with RCGF through Argyll and Bute Council, Sport Scotland, HIE, Robertson Trust and a wide range of other trusts and foundations shortly after. We were working towards a project cost figure that had been estimated by the QS and architect as part of their work and needed to have that funding in place and approved before we could tender for the contractor to deliver the build. The contractor procurement had to be carried out through Public Contracts Scotland and took several months. Timescales were tight, as we needed to have the contractor appointed before the end of March 2021 to secure the RCGF funding. We made it – just!</p> <p>It took almost two years from submitting our funding application to the National Lottery in July 2019, to starting the build on site in March 2021.</p> |
| <b>Learning Points</b>      | <ul style="list-style-type: none"> <li>• Things will take longer than you think. Keep a careful plan of everything that has to happen and in what order, as one thing can hold the whole project up.</li> <li>• Procurement pitfalls – public sector procurement requires that all work is tendered openly, so make sure that you are clear on tendering process at an early stage, or you may have to re-tender later in the process.</li> <li>• Work out carefully the order that you need to apply to funders. Each will have different requirements and timescales, so it is a jigsaw that you need to get right.</li> <li>• Keep in close contact with your funders, they are generally understanding and will do everything they can to help you make things work.</li> <li>• Managing the ongoing funding streams cashflow and claims takes time.</li> </ul>  |

## Introduction

## Checklist

## Strengthening your Project

## Case Studies

1. **MACPool**
2. The Rockfield Centre
3. Friends of Hermitage Park / Helensburgh Community Hub
4. Scenic Sandbank
5. Mull & Iona Community Trust
6. Adventure Oban

## Useful Links



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|-----------------------------|---|
| <b>Background</b>           | The Rockfield Centre is governed by Oban Communities Trust, a Community Benefit Society with charitable status. It purchased/saved the former Primary School building. It's a cultural hub accommodating arts & culture, history & heritage, community wellbeing, education & enterprise.   |
| <b>Specific Projects</b>    | Capital works redevelopment, staff team, Heritage Project- People and Place Eco community dye garden, workshops, exhibitions and events.  |
| <b>Main Funding Avenues</b> | <p><b>Capital works redevelopment:</b> Big Lottery Community Fund<br/>National Lottery Community Assets; Historic Environment Scotland; Scottish Government Regional Capital Grant funding via A&amp;B Council; HIE; Coop Foundation; The Robertson Trust; Garfield Weston Foundation; Macqueen Bros Charitable Trust; Wm Grant Foundation; Hugh Fraser Foundation; Community Members- Community Shares; JTH Charitable Trust; Oban Common Good Fund and individual donations restricted to the capital works.</p> <p><b>Development staffing</b> HIE; DTA, AHF</p> <p><b>Community shares</b> was support specifically for the share offer</p> <p><b>Funding to support activity staffing and delivery of core theme projects</b><br/>Heritage Lottery Fund - Stories, Stones and Bones; Current project - People and Place; Chats Argyll and Islands; - Eco Creative Cluster; Oban &amp; Lorn Art Society - Open Draw; Corra Foundation; Adapt and Thrive; National Lottery - resilience support; Bids 4 Oban - audio equipment; Rank Foundation; Touring Network; Calmac Communities Fund</p>                              |
| <b>Learning Points</b>      | <ul style="list-style-type: none"> <li>• Bring the community with you. Understand how to hold funding events, market yourself, be confident. Sell your story and be passionate about what you offer.</li> <li>• Do research into what the funders want. Some are looking for key words/projects – try to incorporate this into your applications. Show how you can deliver their outcomes.</li> <li>• Work out how you are going to be sustainable: tell the funders what your plans are and how they can help.</li> <li>• Don't be scared to speak to funders. Phone them up, offer to visit them, try to get them to visit your project, build personal relationships. Encourage MSP to visit or funders to host for other funders. Have your sales pitch ready – don't be afraid to ask and be prepared to do a presentation.</li> <li>• Look for pro bono work from local companies; some will do it for their Community Benefit Payback e.g. sponsor events . Also look for sponsorship/funds from local companies e.g. share offer local business supported with social media skills Support your volunteers</li> </ul> |

## Introduction

## Checklist

## Strengthening your Project

## Case Studies

1. MACPool
2. **The Rockfield Centre**
3. Friends of Hermitage Park / Helensburgh Community Hub
4. Scenic Sandbank
5. Mull & Iona Community Trust
6. Adventure Oban

## Useful Links



|                             |   |
|-----------------------------|---|
| <b>Background</b>           | <p>(2 different organisations with shared learning funding experiences).</p> <p><b>Friends of Hermitage Park</b> started life in 2011 with a vision for a restored park.</p> <p><b>Helensburgh Community Hall Ltd</b> took ownership of Helensburgh Community Hub in December 2020 with the plan to turn it into a community hub for future generations.</p>  |
| <b>Specific Projects</b>    | <p>Regeneration of Hermitage Park.</p> <p>Use of Hall for and by the community aiming to become totally sustainable.</p>  |
| <b>Main Funding Avenues</b> | <p>(All figures approx.)</p> <p><b>Friends of HP:</b> Working in partnership with A&amp;B Council they were awarded a Heritage Lottery Fund grant of £2.33 million in 2016. Further funding has come from A&amp;B Council (£280+k), Sustrans £300k, Armed Forces Covenant £253k, War Memorial Trust £60k and the Friends have raised £70k. Many smaller grants have also been secured for specific projects such as a wildlife hotel in one of the old trees. (Total project cost is c. £3.7m. Volunteers have contributed in excess of £140k of volunteer hours at HLF rates since 2017.)</p> <p><b>Helensburgh Community Hub:</b> Scottish Land Fund £190,000, Robertsons Trust grant for a part time Community Dev't Manager. Local fund raising £10k, Co-op fund £8k and Town Centre Fund grant (via A&amp;B C £40k).</p>   |
| <b>Learning Points</b>      | <ul style="list-style-type: none"> <li>• Be able to demonstrate community support. Have partners if you can. It is useful to have counsellors/MSP's on your side.</li> <li>• A Project Manager will really help push a project on.</li> <li>• Write down your vision and mission. Use key words to describe what you want to create (e.g. a word cloud). This helps everyone understand the project, including funders. It also helps with future funding applications and marketing materials.</li> <li>• For the Hub, tenants were in place; the business plan showed the project could be sustainable, which gave funders confidence.</li> <li>• Funders tell you what they want to see in your application and the types of projects they will support. Make sure your project/application matches this closely. Use the key words/language they use (use a highlighter pen to emphasise what they are looking for in the application pack, so that you can echo the key words etc).</li> <li>• Be concise and communicate effectively what you are trying to achieve – they have lots of applications to read through!</li> <li>• Often local supermarkets have community funds you can apply for.</li> <li>• Try to build up a track record – funders feel more confident when others have supported you (even if it is small grants).</li> <li>• Avoid burn out of your board and volunteers. Have a 3-year rotation. Make sure you have the right skill set on board and support your volunteers.</li> <li>• Allow sufficient time for writing applications, they are time consuming and you are unlikely to be successful if you rush at the last minute.</li> <li>• Do not feel obliged to work through an application form in order, if it is easier to start by writing section 7 before section 4 do so. Ensure your message and ask is consistent and focussed throughout.</li> <li>• Save on file the key pieces of information that you will need for any funding application so you can cut and paste. e.g. bank details, SCIO number, addresses etc and objectives and sentences that eloquently and persuasively sum up your organisation and objectives.</li> <li>• Writing good funding applications is a learned skill, do not be disheartened if you are not successful at first.</li> <li>• Keep your project in the public eye, good press and social media coverage are often looked at by funders.</li> <li>• Some online applications don't let you download a copy of the application once you have pressed the submit button. Ensure you have kept a copy.</li> </ul> |

## Introduction

## Checklist

## Strengthening your Project

## Case Studies

1. MACPool
2. The Rockfield Centre
3. **Friends of Hermitage Park / Helensburgh Community Hub**
4. Scenic Sandbank
5. Mull & Iona Community Trust
6. Adventure Oban

## Useful Links



|                             |   |
|-----------------------------|---|
| <b>Background</b>           | Scenic Sandbank is a group of volunteers who have come together having a common interest to make Sandbank village a beautiful place to live work and play. They achieved a Silver Medal in their first year entering Keep Scotland Beautiful in 2019, and again in 2020. They have 176 members with around 15 active members (all non-fee paying), are a limited company and have charitable status. They needed to do this in order to go for larger pots of funding and also because they are in the process of purchasing a piece of derelict ground from the council to create a community garden.  |
| <b>Specific Projects</b>    | Development of picnic area, planters in the village, wheelchair access.   |
| <b>Main Funding Avenues</b> | <p><b>Donations</b><br/>They get some donations from local people wanting to help.</p> <p><b>Grant funding</b><br/>Successfully applied for Community Benefits Fund (£2,500) to develop a picnic area (putting in drainage, hard paths, wheelchair access, buggies access etc.</p>  |
| <b>Learning Points</b>      | <p>Scenic Sandbank sometimes feels disadvantaged because they are a small, remote, volunteer run organisation which often falls between the gaps. Possible opportunities:</p> <ul style="list-style-type: none"> <li>• Increase profile: develop a marketing plan and social media strategy.</li> <li>• Let as many people as possible know about all the good work you do, emphasising how important it is for your community and how much funding helps the organisation reach people.</li> <li>• Stay motivated and be targeted in the funds you apply for. (Keeping people interested and motivated when it all seems to be endless rounds of paperwork and no fun is very difficult. And finding funding streams that fit is also hard. Many sound great but as you get through them you find that there is something that you don't fit and therefore can't apply. It gets frustrating.)</li> <li>• Seek out people in area who may be able to help you with funding applications / become a funding mentor.</li> </ul> |

## Introduction

## Checklist

## Strengthening your Project

## Case Studies

1. MACPool
2. The Rockfield Centre
3. Friends of Hermitage Park / Helensburgh Community Hub
- 4. Scenic Sandbank**
5. Mull & Iona Community Trust
6. Adventure Oban

## Useful Links



|                             |  |
|-----------------------------|--|
| <b>Background</b>           | <p>Formed in 1997, Mull and Iona Community Trust (MICT) is a dedicated and passionate locally based charity and social enterprise committed to improving the quality of life for the residents of Mull, Iona, and its associated islands. Since 2016, MICT's activities have grown considerably in range and scale. Income has increased from £990,000 in 2016 to £1.9 million in 2020. Expenditure over the same period has risen from £700,000 to over £1 million. MICT now manages assets of £7.15 million, up from £1.6 million and provides 11 full-time equivalent jobs on Mull.</p>   |
| <b>Specific Projects</b>    | <ul style="list-style-type: none"> <li>• Countryside Ranger Services</li> <li>• MESS (Mull and Iona Environmentally Sensitive Solutions) including two charity shops.</li> <li>• An Roth Community Enterprise Centre, providing office, meeting &amp; training space.</li> <li>• Nonhebel Community Business Park, providing high-quality, light industrial space and storage for local businesses.</li> <li>• Ulva Ferry Regeneration - affordable housing, community pontoon &amp; community transport.</li> <li>• Ardura Community Forest.</li> </ul>   |
| <b>Main Funding Avenues</b> | <p><b>Grants</b> - MICT could not survive without grant funding, with much of its income still derived from grants. Having never received significant unrestricted grant funding to cover operational support costs, MICT continues to work hard to increase earned income by developing social enterprise activities to ensure the ongoing sustainability of the organisation, as well as addressing the need for full cost recovery in project grant applications. Historically MICT has focused on grant funding to support, specific, charitable projects such as operating our community transport scheme and climate action. Major grant funders include The Scottish Government, The National Community Lottery, Nature Scot, Argyll and Bute Council and Zero Waste Scotland.</p> <p><b>Charitable Foundations/Trusts</b> - Funding from Charitable Trusts, for example Garfield Weston, The Prince's Countryside Fund, The Pebble Trust and The Nationwide Foundation continue to support MICT's financial model, either funding specific projects and/or services (such as community transport) outright or providing the match funding needed to deliver the activities.</p> <p><b>Earned Income</b> - Earned income is also now a critical part of the MICT financial model, generated via sales in the charity shops, rental and services at An Roth Community Enterprise Centre and once loan finance is repaid at the Nonhebel Community Business park via business space rentals. Through the recent sale of felled timber in the Ardura Community Forest MICT now has a one-off opportunity to raise unrestricted income, reinvesting it in the charity and the development of new community projects/services.</p> <p><b>Donations</b> - MICT runs project specific funding raising campaigns, aimed at individuals and businesses to help match fund grant and charitable trust giving. MICT is also developing a new fundraising plan focused around increasing both regular and one-off, unrestricted donations from individuals including in memorial and legacy gifts.</p> <p><b>Loan Finance</b> - Affordable Housing and Nonhebel Business park are part- financed via loans and mortgages.</p> |
| <b>Learning Points</b>      | <ul style="list-style-type: none"> <li>• MICT has recently invested in a dedicated fundraising staff post, proving to be a sound investment in terms of maximising grant opportunities as well as developing for the first time, a fundraising plan for individual giving. If employing staff isn't an option, consider using fundraising consultants for support, particularly for raising finance for large-scale, capital projects.</li> <li>• Examine opportunities for social enterprise activities to make your organisation more sustainable through earned income streams as well as donor fundraising.</li> <li>• Work out what is needed for full cost recovery of each project to cover all the operational support costs and include them in all grant applications.</li> <li>• Community consultation and community owned and written development plans have been key to supporting MICT's successful grant applications.</li> </ul>  |

## Introduction

## Checklist

## Strengthening your Project

## Case Studies

1. MACPool
2. The Rockfield Centre
3. Friends of Hermitage Park / Helensburgh Community Hub
4. Scenic Sandbank
5. **Mull & Iona Community Trust**
6. Adventure Oban

## Useful Links



|                             |  |
|-----------------------------|--|
| <b>Background</b>           | Launched in Jan 2021, Adventure Oban is a not-for-profit, community-led outdoor activity charity supporting equal access for all to Oban’s natural playground. Their aim is to help everyone in Oban have equal opportunity to enjoy the outdoors. Some sections of the community, particularly younger groups, find that social economic barriers are preventing them from accessing Oban’s natural playground.   |
| <b>Specific Projects</b>    | Create an “Adventure Library”; a kit lending framework to lend outdoor equipment to the community.   |
| <b>Main Funding Avenues</b> | <p>Initially they didn’t apply for funding, the focus was on figuring out what they wanted to do and asking the local community to validate their ideas.</p> <p>They launched the “Million Miles” campaign, to capture all the activities done in Oban or by Oban-people. This helps them to get access to schools and find out what young people want.</p> <p><b>Donations</b> - Equipment was donated when a local outward bound centre closed (run by council); wet suits, helmets etc which was a good start. Other community members have donated significant pieces of kit.</p> <p><b>Funding</b> - In summer 2021, they secured funding for an Adventure Library pilot, recruiting an Adventure Co-ordinator for 8 months. Funding has covered the co-ordinator and some new kit – sources include:</p> <ul style="list-style-type: none"> <li>• Oban Common Good Fund</li> <li>• Ikea Foundation Grant</li> <li>• SCVO – Community Capacity Resilience Fund</li> </ul> <p><b>Income</b> - There is potential to create a membership model which could generate income.</p> |
| <b>Learning Points</b>      | <p>This is a new group that would ultimately like to become financially self-sufficient.</p> <p>Possible opportunities:</p> <ul style="list-style-type: none"> <li>• Innovative marketing campaign to engage with the local population.</li> <li>• Support from other organisations such as <a href="#">Atlantis Leisure</a> who act as a third sector incubator, giving advice to new projects in the area. Adventure Oban, in turn, have been passing on their knowledge to the <a href="#">North Argyll Cycle Club</a>.</li> <li>• Champion the ability to be self-sufficient by earning an income from a project. Reduce the stigma about income generation and the attitudes to this.</li> <li>• Maintain a dialogue with the council to help speed up the planning process and decisions for third sector groups.</li> </ul>   |

## Introduction

## Checklist

## Strengthening your Project

## Case Studies

1. MACPool
2. The Rockfield Centre
3. Friends of Hermitage Park / Helensburgh Community Hub
4. Scenic Sandbank
5. Mull & Iona Community Trust
- 6. Adventure Oban**

## Useful Links