

# Fundraising & Budgeting Workshop Part 2

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# Session 2 Overview

- Recap and questions from last time
- What types of funding are there?
- Applying for Public Funding: Creative Scotland
- Creative Scotland review process
- What are they looking for?
- Applying to Trusts and Foundations
- Golden Rules
- Don't forget...
- Any questions?

# What are the different types of funding?

- Public funding  
e.g. Creative Scotland, Arts Council England, Local Authority Grants
- Trusts and foundations  
e.g. regional, arts specific, youth specific, family trusts
- Corporate funding / sponsorship  
e.g. paid advertising, event sponsorship, corporate trusts
- Supporter schemes  
e.g. friends schemes, subscriptions, legacies, sponsored chairs, sponsored commissions
- Revenue / sales income  
e.g. ticket income, merchandise sales

# Applying for Public Funding

## Creative Scotland

- Regular Funding
- Open Funding — £1,000 - £100,000 (Under 15k and Over 15k)
- Hardship Fund for Creative Freelancers
- Youth Music Initiative (YMI)
- Made in Scotland (for Edinburgh Fringe)

NB Creative Scotland funding programmes are undergoing significant change and this landscape is likely to change post-Covid

# Under 15k or Over 15k?

## **Under 15k**

- 8 week turnaround
- Simpler application form
- Often over-subscribed

## **Over 15k**

- 12 week turnaround
- Longer application form
- Slightly less competition

NB Creative Scotland recommend a further 5-week window between application decision date and start of project

# The application process

- Submission of application
- Assessment by specialist reviewer
- (Additional assessment / comments by theme lead)
- Panel review (if sufficiently scored)
- Successful / unsuccessful — feedback provided
- Reapplication if advised

# The assessment process

## Reviewing and scoring

At the initial review stage, applications are given a comprehensive write-up along with a score for each of the four sections:

- a) Artistic and Creative Quality
- b) Public Engagement
- c) Effective Management
- d) Finance Assessment

Assessors will score applications with:

- a strength rating for criteria a) and b)
- a risk rating for criteria c) and d)

These four scores are combined to create an overall application score, which is provided to the panel along with an Assessment Summary.

# Creative Scotland scoring system

## Criteria a) and b) ratings

- a) Artistic and Creative Quality
- b) Public Engagement

Assessed As	Score	Basis for score
<b>Outstanding</b>	<b>4</b>	The application fully meets the criterion and shows outstanding qualities
<b>Strong</b>	<b>3</b>	The application fully meets the criterion and shows strong qualities
<b>Sufficient</b>	<b>2</b>	The application meets the criterion
<b>Limited</b>	<b>1</b>	The application shows some potential but lacks sufficient evidence to meet the criterion
<b>Insufficient</b>	<b>0</b>	The application lacks the evidence required to meet the criterion and is unconvincing in its qualities

# Creative Scotland scoring system

## Criteria c) and d) risk ratings

- c) Effective Management
- d) Finance Assessment

Assessed As	Score	Basis for score
<b>Low</b>	<b>2</b>	Evidence that the applicant has strong capacity to deliver the planned programme
<b>Medium</b>	<b>1</b>	Evidence of some risk to the applicant's capacity to effectively deliver the planned programme which will require monitoring
<b>High</b>	<b>0</b>	Evidence of significant risk to the applicant's capacity to deliver the planned project

# Is it Fundable?

- Highest possible score = 12
- Considered 'fundable' and put forward for panel review if it scores 7 or over.
- Any applications rated **Insufficient** or **Limited** in criteria a) and b), should be recommended as **Not Fundable**.
- Recommendation of value of award is made by the **Assessor** before it goes forward to panel review. (The panel can override the Assessor's recommendations).
- Don't underestimate the second half of the application form — a good idea is not good enough. A thorough risk assessment, management plan and robust financial framework are crucial.

# What are they looking for?

## **Artistic and Creative Quality**

- Does the project demonstrate excellence and/or experimentation?
- the level of artistic ambition and risk
- The track record/achievements of the applicant
- Quality and range of partnerships involved
- How the project will further the organisation's or individual's development

# What are they looking for?

## Public Engagement

- Understanding of the need/demand for the project
- Is there demonstrable public benefit that will result from the project in the near, medium or longer term?
- Are there clear and realistic plans to increase numbers and range of audiences/customers?
- Are the accessibility plans appropriate to the type of project?
- Use of digital technologies to extend the reach of their work or to take it to audiences that are typically less accessible?
- Presentation of the work - e.g. relaxed performances, reduced ticket price for carers, Sign Language Interpreted performances etc?
- Is the programme strengthened through the distribution of work through touring, digital platforms, partnerships, etc.?

# What are they looking for?

## Management

- Is the proposed work realistic and appropriate in the context of the track record, type and scale of the individual/organisation and its recent activity?
- Does the individual/management team have a strong track record of delivery?
- Are proposed partnerships appropriate to the type and scale of project and will they make an effective contribution?
- Is there clear awareness of risks to the successful delivery of the project and evidence of appropriate means to mitigate them?
- Is there evidence that the individual/organisation listens to and acts on feedback from audiences, users, peers, stakeholders and other partners?
- Are appropriate evaluation and self-assessment plans in place?

# What are they looking for?

## Financial Assessment

- Has the applicant provided a comprehensive and transparent budget appropriate to the scale and type of project?
- Is there evidence of realistic costing for any equalities and diversity requirements - e.g. are any costs included for access (sign language interpretation of programmes on a regular basis etc.)?
- Are all operational costs related to the project rather than being costs for the applicants' core costs?
- Are artists' fees in line with recognised codes of practice? e.g. MU
- What is the organisation's previous experience of managing grants as core funding?
- Does the applicant have a track record of financial sustainability?
- Has the applicant identified risks and detailed appropriate steps to manage them?
- Does the application have robust financial monitoring and reporting arrangements?
- Does the applicant have plans to obtain funding from other sources?
- What percentage of this is confirmed, and how convincing are plans to secure such partnership funds?

# Applying to Trusts and Foundations

## Where to find them

Help Musicians Funding Wizard:

<https://www.helpmusicians.org.uk/creative-programme/funding-wizard>

Making Music (members only):

<https://www.makingmusic.org.uk/resources/find-a-funding-opportunity>

SCVO Funding Scotland:

<https://fundingscotland.com/>

- Sign up to regular updates from e.g. Arts Professional, Classical Music Weekly, Creative Scotland Opportunities.
- Scour websites and concert programmes of other music organisations/individuals for their current and past funders.

# Applying to Trusts and Foundations

- Are they the right trust for you? Be honest with yourself, don't waste your time if it's not the right fit.
- What are their priorities? Who have they funded previously? What level of funding do they offer? What is their typical award?
- Follow the Golden Rules and think about how you structure your application. 2 pages of text plus a budget is almost always enough.
- Call them! Are they open for applications at the moment? When is their next meeting? Ask if your project is up their street. Most trusts like to develop a line of communication, and you may get a helpful steer.
- Check if the trust has an application form or simply accepts a letter
- By all means use a template application as a basis, but avoid carbon copying applications between trusts — personalise them, make it clear why that particular trust stood out to you.
- Spell out the need and the benefits first, save who you are until later. Don't overdo the detail.
- Back up your claims, provide evidence with quotes
- Balance your budget!
- Be realistic, make the ask an easy one for them

# Funding Applications: Golden Rules

- Why are you doing it?
- Where is the need?
- Who will benefit and how?
- What makes your application stand out?
- How do you match the aims of this fund?
- Provide concise, evidence-based comments
- What's the ask, and where is the rest of the income coming from?
- How did you arrive at your figures?
- What will happen if the application isn't successful?
- Plans for evaluation, dissemination, and knowledge sharing
- Confirmation of partnerships and letters of support
- Funders do not fund retrospective activity
- Make the ask an easy one – make it a 'no-brainer'

## Don't forget...

- Thank them, thank them, and thank them again
- Check their requirements for crediting (e.g. logos)
- Keep them updated if your project changes/develops
- Invite them to the concert / broadcast, or send them a recording / concert programme after the event
- Keep records and ensure you evaluate the project properly — this can often provide the basis of your next application
- If a fund supported you once, there is a good chance they will do so again — keep in touch, follow up and mention a previous successful award if you apply again