

Waterford PPN Training Programme
Workshop: Grant Application Process

8th June 2022
Via Zoom



Welcome & Introduction



- Tom O'Leary
- Over 20 Years working as a development officer, consultant, mentor and trainer in communities - developing social enterprises, community projects, facilities and services.
- Feasibility Analysis
- Community Planning
- Strategic and Business Planning
- Mentoring & Training
- Sourcing Funding



Financial Planning

A not for profit organisation must think like a for profit business.

i.e. Cashflow is the KEY consideration

More money coming in than going out

You May be an Not For Profit but you are also a **Not For Loss** Organisation

What Funding is needed for:

- Operational Costs – Ongoing funding requirements
- Reserve Policy
- Project Analysis – Feasibility Study Funding
- Project Development – Capital Funding

Sources of Funding

- Fee Income – For Services, Products, Facilities. Membership, etc.
- One off Grants
- Core Grants
- Fundraising
- Online Fundraising
- Sponsors
- Partners
- Donors
- Philanthropy
- Social Loans – Clann Credo, Community Finance Ireland
- Commercial Loans
- In Kind Contributions – Labour, Materials, Equipment

GRANT AID

Grant Aid

- Specific Grant Aid – Pilot Projects, Once off funding etc. (e.g. LAWPRO)
- Annual Grants – HSE grants, Community & Voluntary Supports etc.

The basic steps:

- Research what grants are available for your type of project
- Know the deadlines and criteria – research the aims of the grant and previous groups awarded
- Have the consultation and needs analysis done i.e. have a project identified
- Have all necessary documentation ready on file
- Complete the application form and provide all technical and support documentation required

Grants Planning

Name of Grant	Source	Contact	For what Project	Application Deadline	What is required	Grant Preparation Actions	Responsibility	Deadlines

Source of Grant Information/Announcements

www.fundingpoint.ie

www.Activelink.ie

Our Rural Future – Funding Calendar 2022

<https://www.gov.ie/pdf/?file=https://assets.gov.ie/218465/a39f6b0f-38ef-4917-8c1a-4e17e4a3c676.pdf#page=null>

e-bulletin subscription >

Community Exchange Categories

Events

Funding

Fundraisers

News

Services & Requests

Training

Volunteering

Latest Jobs

- View all jobs & tenders
- View deadline calendar

Community Exchange

This is the Activelink Community Exchange noticeboard.

You can advertise here, volunteering positions, news items and many other advert types are carried free of charge. [See our advertising information page.](#)

Region

Category

Filter

Summary View?

☐

Title	Region	Listed *	Category
Fingal Counselling Service: Volunteer/ Counsellor / Psychotherapist	Swords, Co Dublin	13/12/2021	Volunteering
Donate to SERVE today to help us support our overseas partners!	Nationwide	13/12/2021	Fundraisers
Aware: Support Services	Nationwide	13/12/2021	Services & Requests
Women's Aid 24hr National Freephone Helpline	Nationwide	13/12/2021	Services & Requests

FUNDING



Sample of Grants

Name	Source	Funding
LEADER	Local Development Companies	90% Feasibility up to €25k 75% Capital up to €250k
Town and Village Renewal	Local Authority	€20k to €100k
Outdoor Recreation and Infrastructure Scheme		Small Scale = €20k Medium Scale = €200k Large Scale = €200 - €500k
Rural Regeneration Development Fund Urban Regeneration Development Fund	Department of Rural and Community Development Lead Applicant – Local Authority or Development Company	Category II – Predevelopment Stage – Planning, Design and Analysis (Shovel Ready) Category I – Development Phase – Over €500k plus projects
Community Enhancement Programme	Local Authority	Community Amenities and Facilities
Community Support Fund	Local Authority	Community Projects and Facilities
CLÁR	Department of Rural and Community Development	Community Projects and Facilities
POBAL Programme	Range of Funding Programmes	https://www.pobal.ie/programmes/
Community Foundation Grants	Range of Grants	https://www.communityfoundation.ie/grants
Rethink Ireland	Range of Grants	https://rethinkireland.ie/our-funds/

What to investigate

- Eligibility Criteria
- Types of projects funded
- Aims of the grant
- Application Process (including where applicable the online registration process)
- Terms and Conditions
- Amounts that can be applied for
- Timelines
- Matching funding requirements
- Supporting Documentation required

Why are applications turned down?

- Fund oversubscribed
- Not eligible
- Received application beyond deadline
- Poor application
- No consultation shown
- Poor or no track record
- Missing supporting documentation
- No needs analysis provided
- No matching funds

RURAL DEVELOPMENT PROGRAMME (LEADER) 2014 – 2020

Evaluation Committee Scoring Record

Date: _____

Time: _____

Project Promoter: _____

Project Ref no: _____

Project Title: _____

<u>Assessment Criteria</u>	<u>Objective</u>	<u>Issues raised by Evaluation Committee</u>	<u>Weighting</u>	<u>Score</u>
Compatibility with Local Development strategy	Do the project proposals meet the criteria set out in the LAG business plan for the relevant measure?		20	
Innovation	Is the product innovative in its nature and does it displace existing enterprises?		15	
Promoter experience	Does the promoter have the Training/skills, track record or experience to <u>deliver</u> ?		20	
Financial Viability	Are the project costs justifiable (reasonableness of costs) and is funding available to co-fund the project?		20	
Sustainability	Is the project viable and will the service continue to be <u>delivered</u> ?		10	
Requirement	Does the proposal target a specific need or address a specific gap in the market?		15	
Total			100	

N.B. Projects must receive a minimum score of 65% prior to being recommended for approval.

- Has the potential level of deadweight been assessed for this project? Yes ☐ No ☐
- ~~i.e.~~ would the project proceed without LEADER funding? Yes ☐ No ☐

Recommendations of the Evaluation Committee: _____

Documentation Required

- Strategic Plan
- Business Plan
- Feasibility Study

- Needs Analysis
- Rationale
- Strategic Objectives
- Strategic Context
- Operational Model
- Financial Viability
- Impact Analysis

- Annual Report – Track Record
- Annual Accounts
- Constitution or Memos and Articles of Association (CLG)
- Quotations
- Planning Details (if applicable)
- Technical Documents e.g. drawings, BOQ, surveys
- Proof of consultation
- Tax Clearance
- Policies and procedures – if requested but should be available anyway
- Insurance

Previous Grant Template

Grant	Source	Date Received	Purpose	Amount		Contact details of person within Funding Organisation	Fully Drawn Down Yes/No	Value of Matching Funds Provided	
				€	%			€	%

Needs Analysis

- What are you applying for?
- How did you identify the need?
- What research have you done on the project?
- What will be the impact?
- Will the project cause displacement?
- How will you sustain the project?
- How much do you need?

Large Capital Projects will in most cases require a feasibility study to be completed.

Organisation Structure

- Experience
- Track Record
- Operational Structure
- Management and Evaluation
- Experience of managing public funds

Strategic Context

- Show how the project aligns with strategies and objectives proposed in the local, regional and national policies.
- Identify under which strategy/policy does the funding programme fit

Examples:

- Our Rural Future – Rural Development Policy 2021-2025
- County Development Plan
- County Tourism Strategy and Action Plan
- Municipal District Local Area Plan
- Outdoor Recreation Plan for Public Lands and Waters in Ireland
- Climate Action Plan

Highlighting the alignment of the Project with Local, Regional and National Strategy

Strategy/Policy Document (national, regional, local, and EU policy)	Relevant Objectives from the Strategy/Policy Document	What actions and outcomes from the project action plan reflects/complements or helps achieve this objective?
e.g., County Development Plan		
e.g., Ireland 2040		
e.g., LECP		

Project Outcomes	Relevant Strategic/Policy Objective				
	National Development Plan (Ireland 2040)	Southern Regional Assemble Draft RSES	Kerry County Development Plan (2015-2021)	Kerry LCEP (2016-2021)	Tralee MD LAP (2018-2024)
Provision of Sport and Recreation Space	NPO-26, NPO-30, NPO-18 NSO-7	RPO-7 RPO-191 RPO-192	SC-21, SC-39 to SC-46, SC-48 SC-16	Section 6 (2.5)	AT GO-01 DT-01
Provision of accessible facilities for people with disabilities	NPO-28	RPO-173	SC-1, SC-2, SC-5	Section 7 (3.7)	
Expansion of Community Facilities to Support Older People	NPO-28, NPO-30	RPO-174	SC -11, SC-41	Section 7 (3.5)	
Expansion of Facilities to Support Young People	NPO-28	RPO-169	SC-22 to SC-28	Section 7 (3.4)	AT-C-02
Promote Local Heritage	NPO-18	RPO-195 RPO-198	T-58	Section 5 (1.38)	
Create Job Opportunities	NPO-21	RPO-46	ES-20	Section 5.2	AT GO-03
Provision of Co-working space	NPO-21	RPO-47	ES-35	Section 5.2 (1.2.2)	AT GO -01
Expansion of Ardfert CC as a Social Enterprise	NPO-25	RPO-37	ES-25 to ES-28	Section 5.2 (1.12.1)	AT GO-03 AT GO-01

Matching Funds

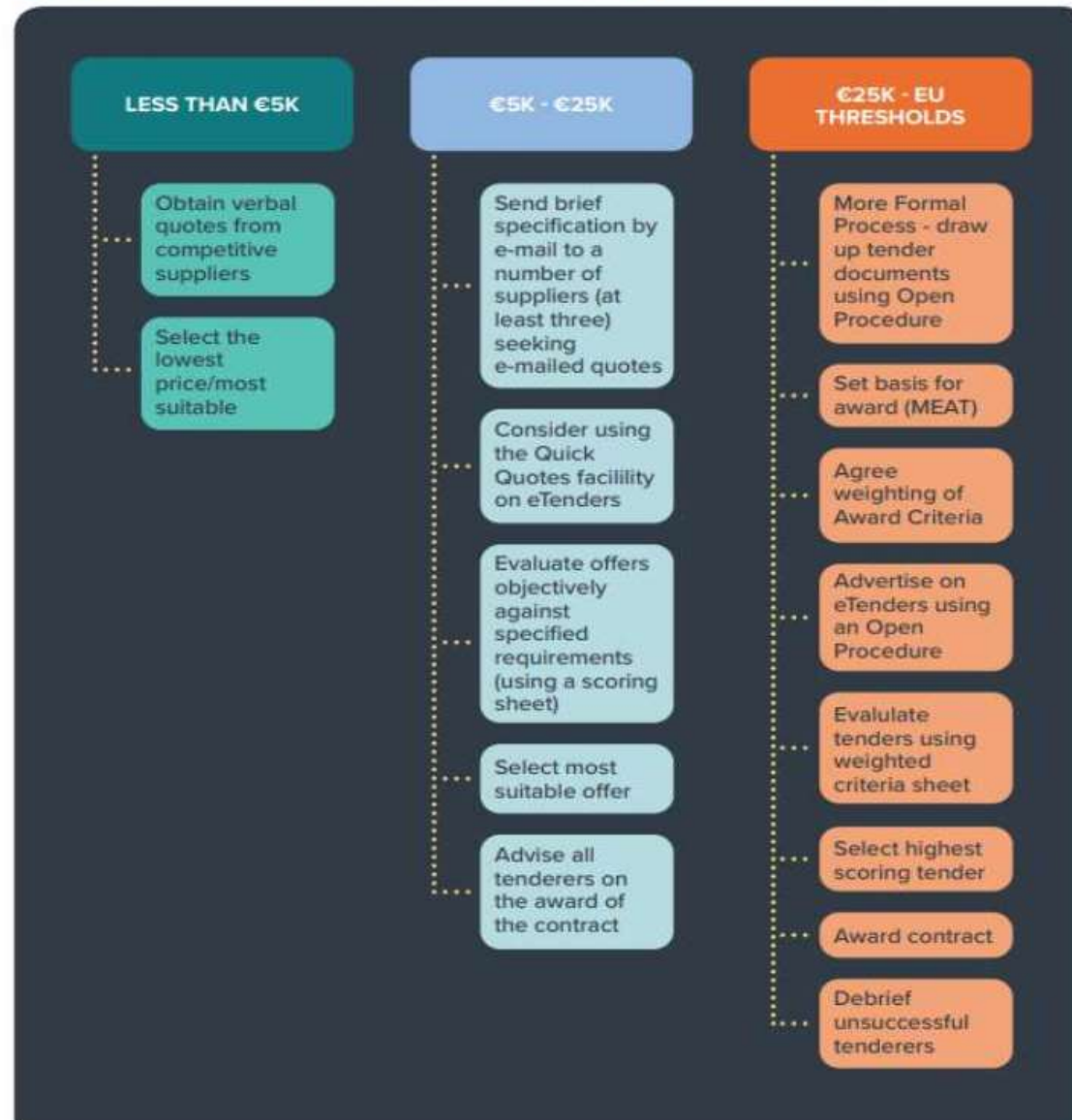
- Percentage Funds outlined in criteria
- Look at cash matching requirements

Options will include:

- Money held in the account (reserves, revenue from fundraising etc.)
- Loan (Bridging and Term)
- In Kind (where applicable) – property value, voluntary labour contributions

Quotations and Procurement

STEPS IN BELOW THRESHOLD TENDERING



Online Applications

Differences

- All online either through a dedicated portal or emailed application
- All supporting documentation uploaded – no hard copies submitted
- Usually more condensed application forms
- Location details ,may be linked to Eircode finder/map
- Digital Signatures
- Strict Deadline
- Once submitted cannot be edited

Advantages/Disadvantages

Advantages	Disadvantages
<ul style="list-style-type: none"> May be shorter – less content to be included 	<ul style="list-style-type: none"> Sometimes word count possible is very low which makes it difficult to include enough detail to 'sell' the project.
<ul style="list-style-type: none"> Easier to manage the process such as required files for uploading etc. 	<ul style="list-style-type: none"> Requires greater editing skills – some systems have limited editing/formatting options
<ul style="list-style-type: none"> Teams can work on the application 	<ul style="list-style-type: none"> May require passwords and login to access the portal
<ul style="list-style-type: none"> Levels the playing field – in some cases the application forms are simplified 	<ul style="list-style-type: none"> Requires decent broadband
<ul style="list-style-type: none"> Some applications have autofill sections which makes it easier to complete (e.g. automatic totalling of costs) 	<ul style="list-style-type: none"> Requires some knowledge of IT – file uploading, saving files as PDF documents, moving between applications
<ul style="list-style-type: none"> In some cases the grant process is all through a portal i.e. draw down process – uploading paperwork, accessing files etc. e.g. Sports Capital OSCAR system 	<ul style="list-style-type: none"> Strict Deadlines
<ul style="list-style-type: none"> Forces groups/individuals to be more efficient in completing the application and making their 'pitch' 	<ul style="list-style-type: none"> Some applications cannot be printed for sharing purposes or reviewing

Preparation

- Have all the required documentation in one place
- Create project file and save copies of documentation on the project file
- Store project file on one drive, google drive, etc.
- Use same login and password details (if possible) for all applications
- Agree on who is the contact for the application – use an email that is checked regularly
- Agree who has ‘admin/editing’ access to the application
- Highlight the deadline date on the diary and set a time-frame for completion
- Review the guidelines carefully and highlight key criteria and requirements

Filing System

← → ▾ ↑ 📁 > tom o leary > Google Drive > Training Links 2020 > DEMO CSF GRANT FILE ▾ ↻				
📁 DEMO CSF GRANT FILE				
Name	Date modified	Type	Size	
📄 Annual Accounts	01/02/2022 07:59	PDF Document	26 KB	
📄 Bank Statement	01/02/2022 07:59	PDF Document	26 KB	
📄 CSF-2022-Guide-to-Completion-of-Onli...	31/01/2022 23:22	PDF Document	264 KB	
📄 Edit Document	31/01/2022 23:23	Microsoft Word D...	16 KB	
📄 Feasibility Study	27/01/2022 16:33	PDF Document	8,105 KB	
📄 Memos and Articles	31/01/2022 23:25	PDF Document	33 KB	
📄 Online Application CSF Guidelines	31/01/2022 23:23	PDF Document	656 KB	
📄 SAMPLE QUOTE 1	31/01/2022 23:03	PDF Document	32 KB	
📄 SAMPLE QUOTE 2	31/01/2022 23:04	PDF Document	32 KB	
📄 SAMPLE QUOTE 3	31/01/2022 23:04	PDF Document	33 KB	
📄 TAX clearance	31/01/2022 23:08	PDF Document	128 KB	

Portals

- Most applications will have a portal or hub where the applications are completed
- Some will require a registration or log in details
- NB. Some will have a deadline to register on the system (e.g. OSCAR – Sports Capital Applications)

Measuring Impact

(sample wording below for a disability project)

- Young people with ID need routine and structure, and any isolation from their social network, tutors and personal assistants has profound effects on young people.
- By using technology to facilitate young people with ID to engage and interact online reduces anxiety, depression, loneliness and fear. As we have seen it leads to improved mental and physical health and increases confidence.
- Up to 30 young people will be involved directly in the programme. As the project is online the numbers of people that will have access to the website is endless as the content and programming will be targeted at young people with ID, their families (parents and siblings), carers, service providers, special needs assistants, employers and people within the community.
- We have robust evaluation and performance measuring tools built into all our programming. Each participant is supported in identifying their goals and preparing a personal development and skills attainment plan. Impact and outcomes will be measured by analysing the engagement by participants (number of logins, time staying online engaging with the programmes etc.) and ongoing feedback from site users and participants.

Will the project proceed without funding

(sample wording below)

- No
 - In a limited capacity
 - Yes
-
- We have demonstrated that there is an immediate identified need for the project. Without full funding this project can only be developed on a phased basis at a greatly reduced number of people participating. The only option to proceed at the required scale without funding is to secure a social finance loan. The repayments however would put or existing sustainable annual budgets at risk.
 - In summary we are committed to this project and meeting the needs of our young people in our community, but with the funding and support of we could do so much more and have a much wider impact and make a real difference to the lives of vulnerable young people.

The question of displacement

(Sample wording below)

- We as a voluntary board continue to engage with our community, stakeholders and other organisations operating in our community and/or providing supports to people that avail of our services. Where possible we collaborate with other organisations on the delivery of projects and services. We also support other organisations through referral systems (for supports and services requested, but not delivered by our centre).
- We endeavour to maximise the supports coming into our community and look to achieve value for money through partnerships and joint initiatives. Rather than displace or compete with other projects or organisations, the project we are seeking funding for will complement the existing services provided to our community. The rationale for this project is based on the identified gaps in service provision in our community.

In Summary – the secret of selling!

- Every grant application is a sales pitch
- With any sales pitch, you need to understand the person you are pitching to
- What is relevant to them?
- How does your project benefit their aims?
- Are the features of your project meeting their criteria/aims?
- Does your project represent value for money?
- Is the impact benefit of your project easily demonstrated and measured?
- Do they trust you?

Thank You

For more information, supports and advice contact tom@olatc.ie

