



Livery Charity Chairs Group

sharing and learning

Hot Topic # 4 - September 12th 2022

Grants – the application process & achieving impact

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and

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The experience of The Worshipful Company of Insurers Charitable Trust

A presentation for the Livery Charity Chairs Group
Monday 12 September 2022

Background

- * Haphazard application process
- * Regular need to return to applicants for further information or carry out our own research
- * Waste of Trustees' and applicants' time and resources

Solution

- * Standardise all documentation both for application for grants and for follow-up
- * Standard application form on website with clear questions and required attachments
- * Clear qualification criteria on website so as to avoid wasted applications from larger charities
- * Standard grant confirmation and rejection letters, the former specifying further reporting required
- * Formation of a sub-committee to scrutinise all applications and make recommendations to Trustees

Application Form

Originally in print-off format but now fully interactive so it can be completed and attachments uploaded online:

- * Website page: <https://www.wci.org.uk/wci-we-give/support-for-charities>
- * Application form: https://docs.google.com/forms/d/e/1FAIpQLSdje0Bmf5ZDDDToMbpwyxJo3rCsplKsHsyIgj4W_KIjTY_KYA/viewform

Experience

- * Greater efficiency in application process
- * Rarely any need to return to applicants for further information
- * If there is any shortfall in information required it is clearly the applicant's fault so less chance of annoying applicants

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Grants

How to achieve impact

Denise Fellows

Past Master and Treasurer of Charitable Fund



*The Worshipful Company of
Management Consultants*



Wasting grant funding

Charities spend £900m a year in costs applying for grants

Are we doing all we can to help to reduce the costs?



Helping charities to apply

Publish on your website:

- The objectives for your fund
- The criteria for successful applications
- A clear process for application
- Timescales
- Case studies of successful applicants
- Informative Annual reports



Helping charities who fail

If an application is unsuccessful:

- Let them know
- Provide a reason for the failure



Helping charities who succeed

If an application is successful:

- Let them know
- Provide funding promptly
- Keep in touch
- Ask for feedback on the impact



Beyond streamlining

- Create a culture of innovation
- Embrace an abundance mindset
- Intentionally learn and improve
- Collaborate with other funders for impact

Grants

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