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ANATOMY OF A SUCCESSFUL FUNDING PROPOSAL

TRUSTS & MAJOR DONORS
CONFERENCE 2025

fundraising
everywhere

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ABOUT LIME GREEN CONSULTING

BE MORE STRATEGIC

Business planning
Facilitation
Theory of change

BECOME MORE SUSTAINABLE

Fundraising strategy
Advice & mentoring
Case for support
Trading activities

ACCESS MORE FUNDING

Bid writing
Project ‘packaging’
Prospect research
Template content

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LET’S DELVE IN…

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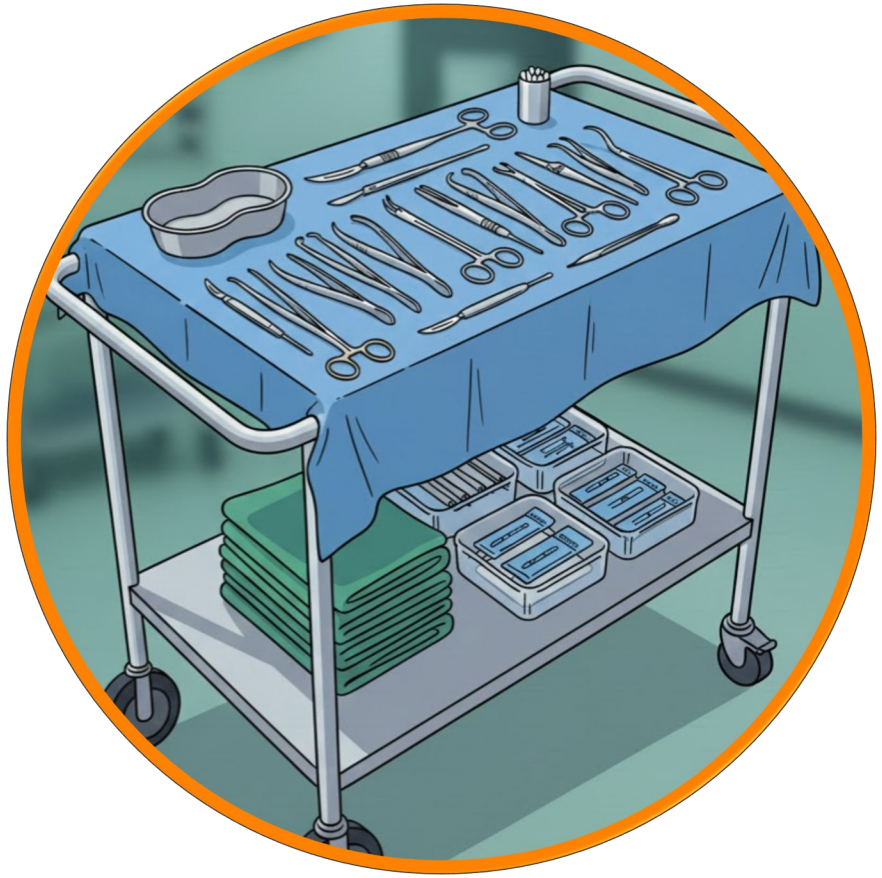
INSTRUMENTS ON YOUR SURGICAL TROLLEY

- Which of your funding needs are the best fit for the funder
- Statistics (about your service users, their needs, your impact)
- Third party research and evidence that demonstrates the need
- Your own consultation data (quantitative & qualitative)
- Case studies and testimonials
- Your credentials (what makes you great at what you do?)
- Knowledge of 'competitors' and gaps in the local or causal landscape



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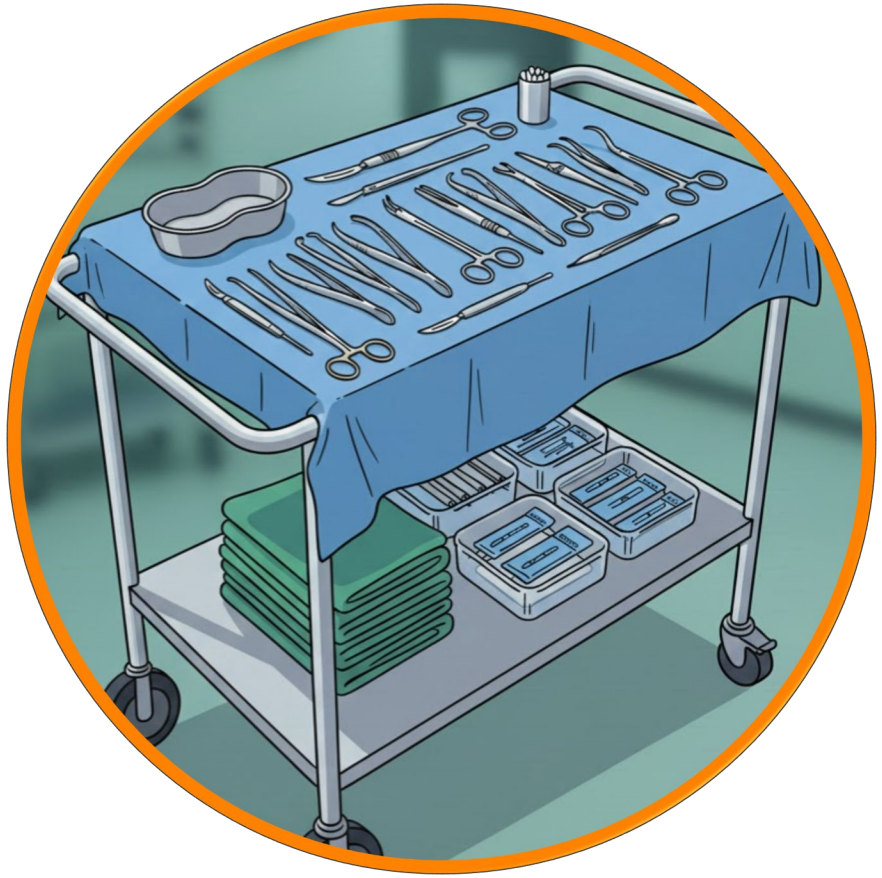
INSTRUMENTS ON YOUR SURGICAL TROLLEY

- Monitoring, evaluation and outcome data – both past and future plans
- Learning/development around a project
- Infographics
- Photo / video / audio content
- Information on your partners and funders
- Awareness of your policies (e.g. safeguarding, diversity & inclusion, reserves, climate change)
- Endorsements from 'experts'
- Any awards / formal recognition for your organisation



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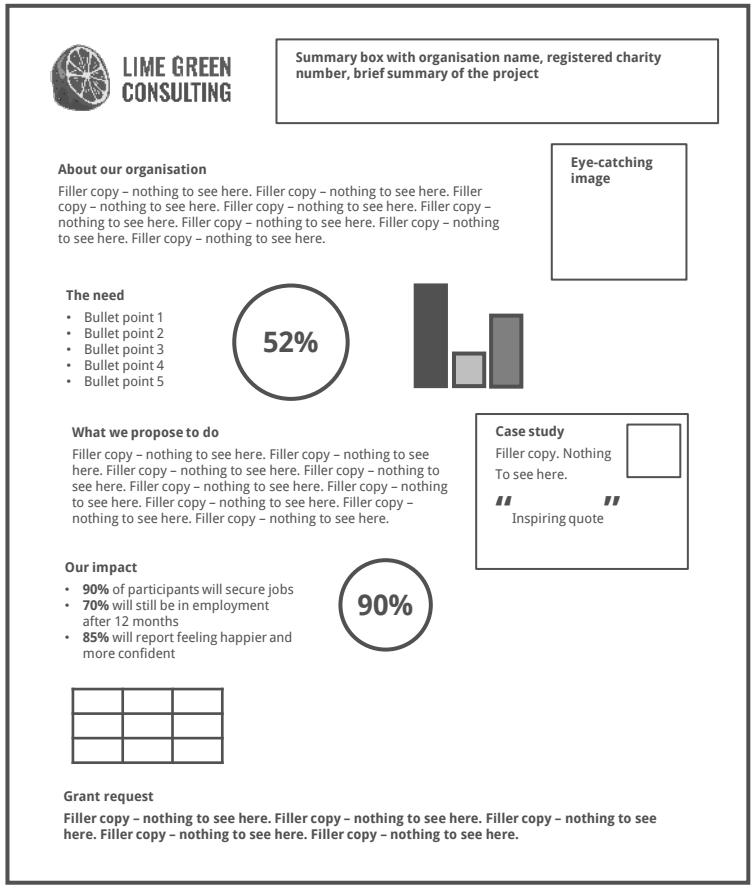

Proposal document (typically 2-4 pages)

Accompanied by a covering letter/email or short application form and any supporting documents

Use your case for support but tailor each application to the funder in question

Always familiarise yourself with their required contents and funding criteria

Some funders have preferences for font size, inclusion of images, even margins…

Stuff that's helpful but inessential (just like the organ) – appendix it!

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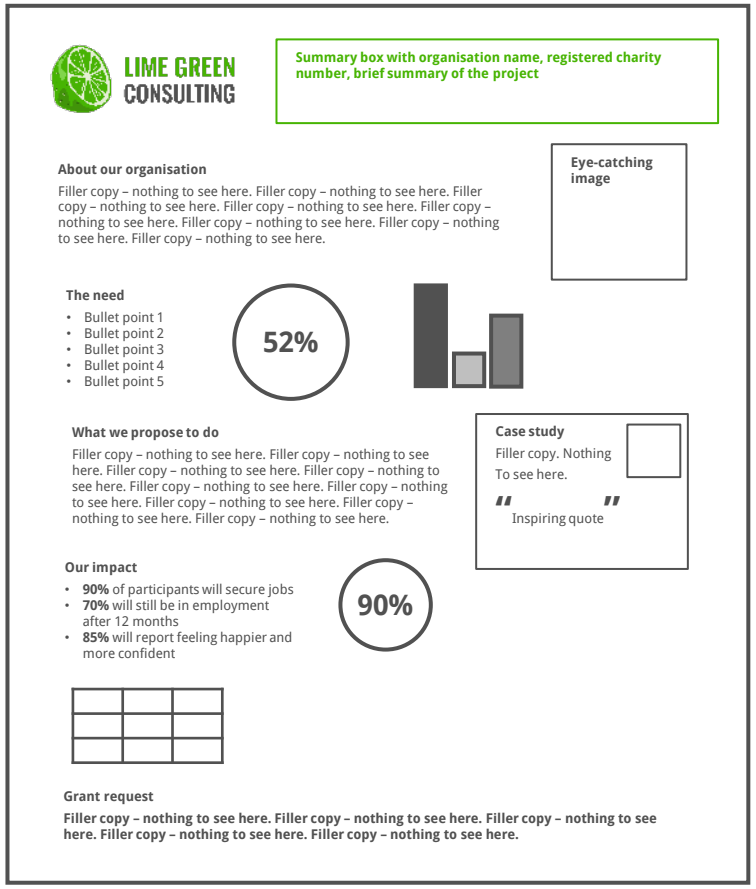

Organisation logo & registered charity number

TL;DR box – summarise your ask: what, where, when, how much, so what?

e.g. "<Org name> is seeking a grant of £XXXX which equates to 50% of the annual cost of our employability programme for young care leavers. This will enable participants to improve their interview skills, secure sustainable jobs and reduce their long-term dependence on benefits."

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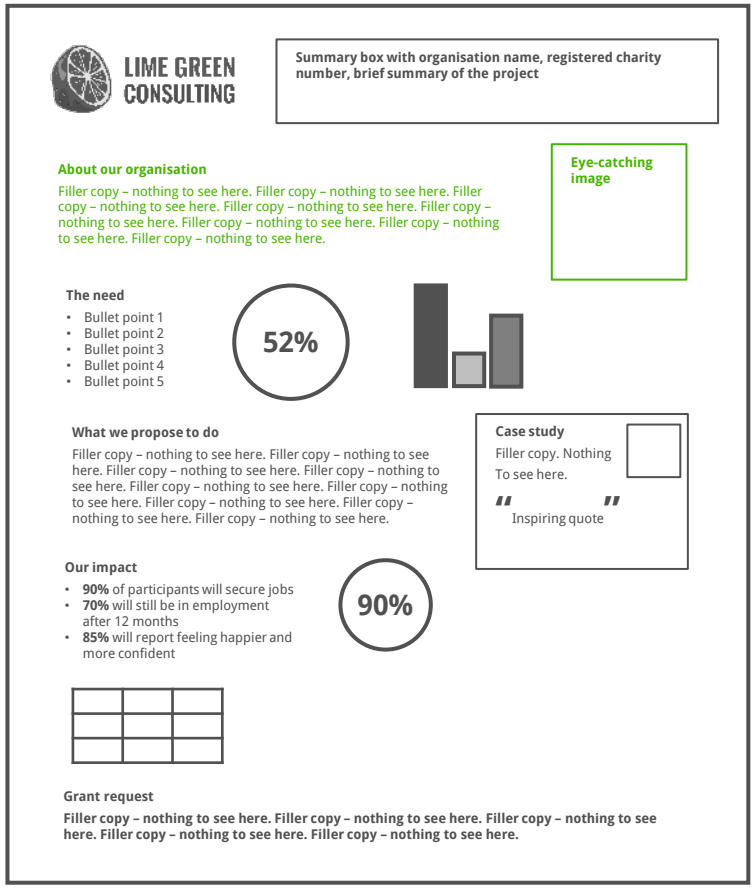

Clear summary of your organisation – establish up front the things that make you well placed to succeed (e.g. expertise, track record, awards, lived experience, user-led)

Define acronyms when you first use them, even common ones e.g. "Special Educational Needs & Disabilities (SEND)"

Include an eye-catching image

Not a long-winded history lesson!

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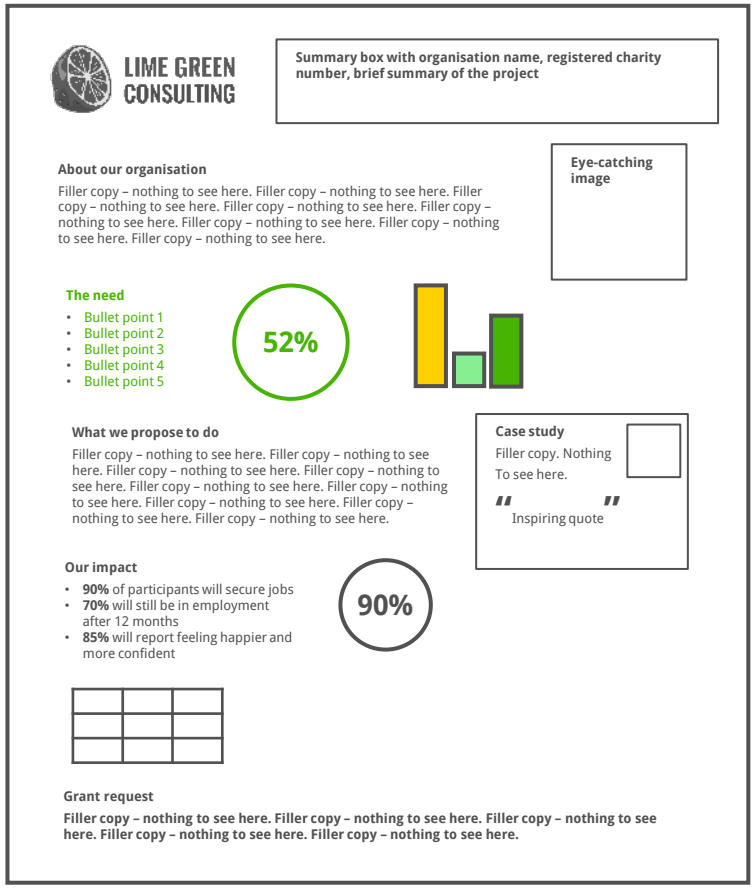

The need: conveying the problem you exist to solve.

- Third-party evidence/statistics
- Your own consultation data
- Case studies/quotes/endorsements

Use bullets, infographics, tables

Make it easier to convey complex information and break up the text

Don't make the funder work too hard – they probably won't!

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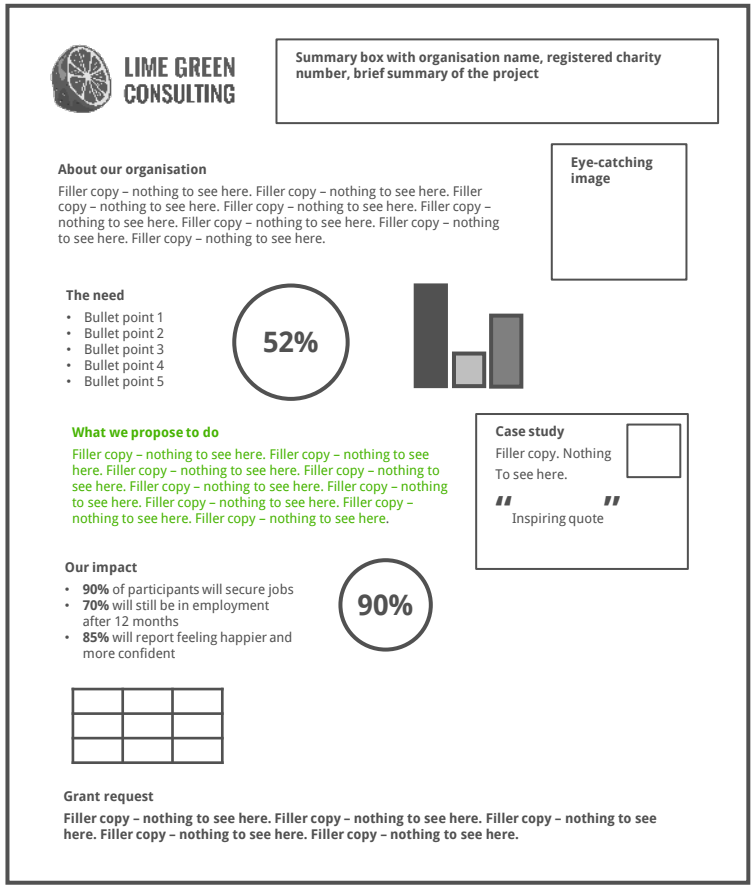

What you do/what you propose to do about it

Be specific about **your activities (outputs)** - when, where, how often, who runs them, etc.

Use bullet points or a table to lay this out clearly

Be specific and to the point

Be wary of using jargon or internal language

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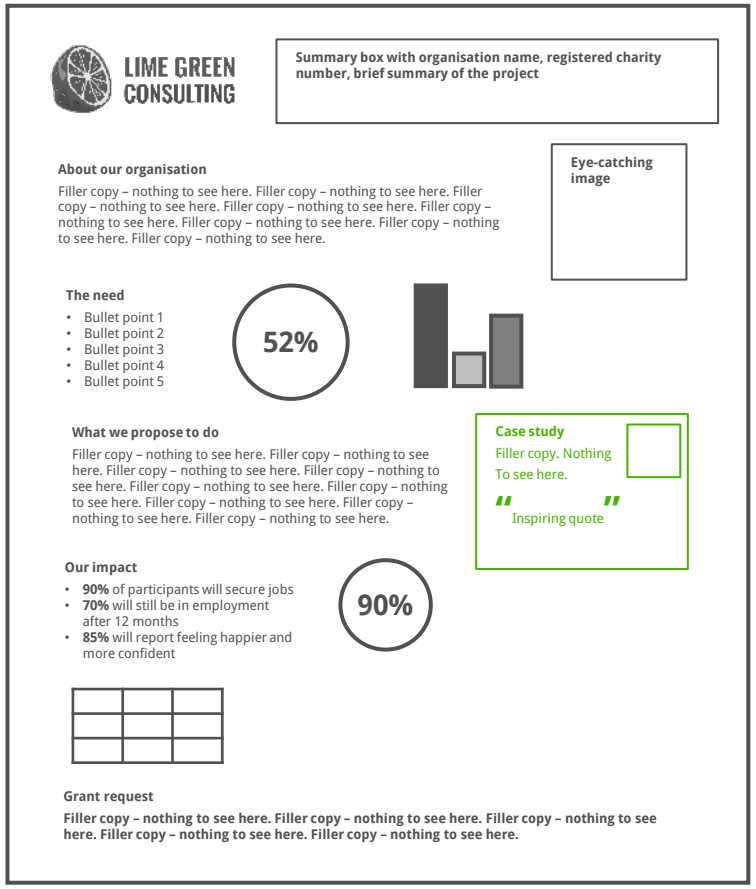

Case study and/or quote from a service user, with an image if possible

Increases emotional impact, brings your work to life – connects to the heart!

Always seek permission first, and change the name if necessary

Avoid dehumanising:

Lettered/numbered people

"Our client/service user"

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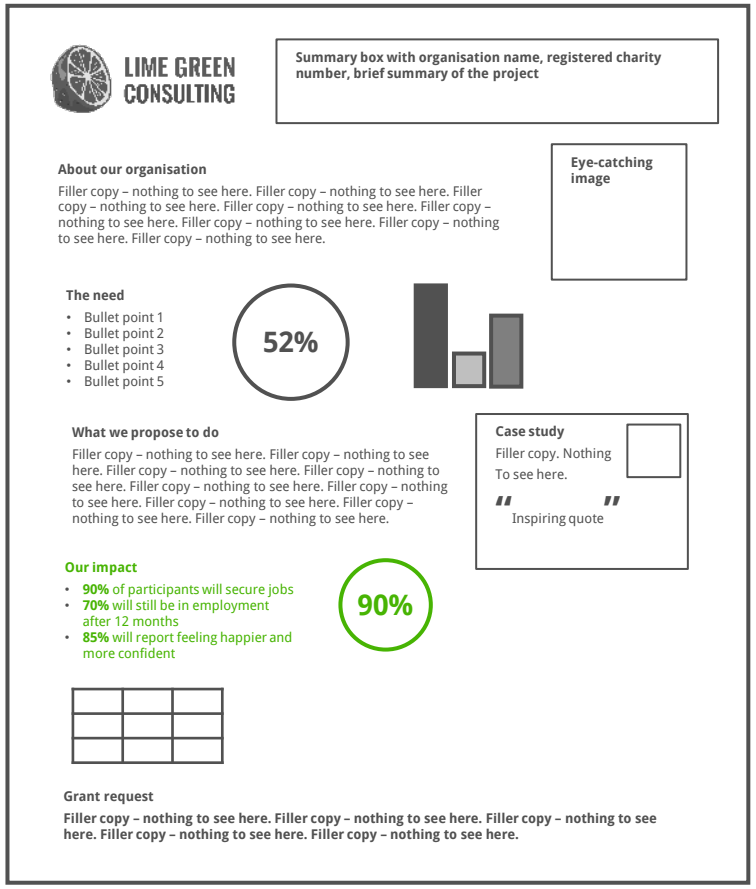

Clear, measurable outcome targets, linking outputs to outcomes, e.g.

90% of participants will secure jobs

70% will still be in employment after 12 months

85% will report feeling happier and more confident

Think in terms of short > medium > long-term outcomes/impact.

Specify how you will measure or monitor these changes.

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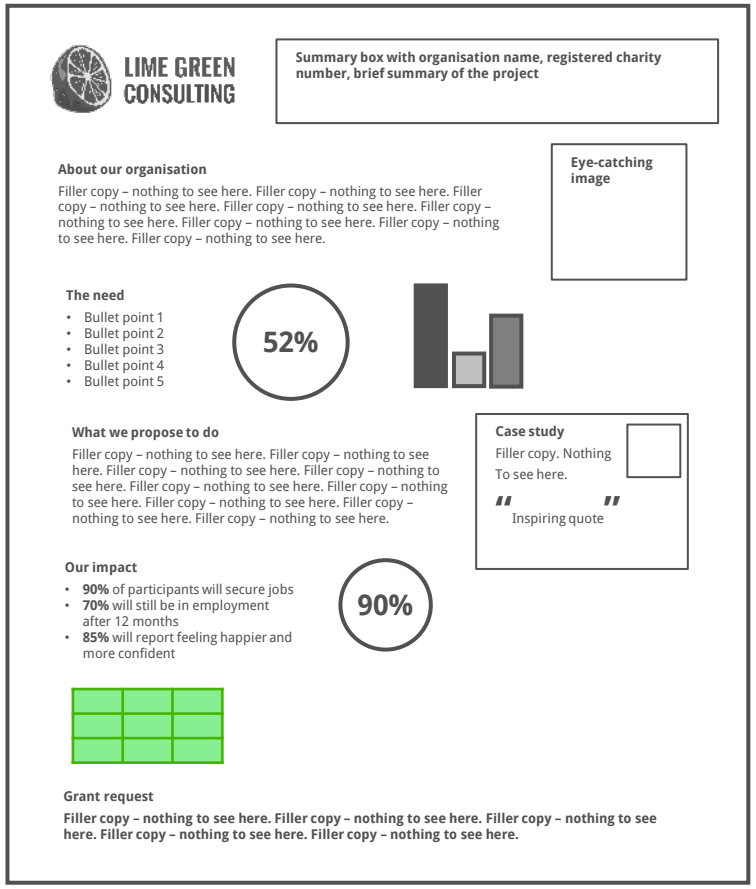

Include a budget

- Include three columns for Item – Cost – Notes/Details to ensure transparency
- Make sure it adds up!
- Avoid only round numbers if possible
- Highlight any match funding or funding already secured
- Some funders require you to state how you anticipate to make up any shortfall
- Include proportionate management/overhead costs into project budgets

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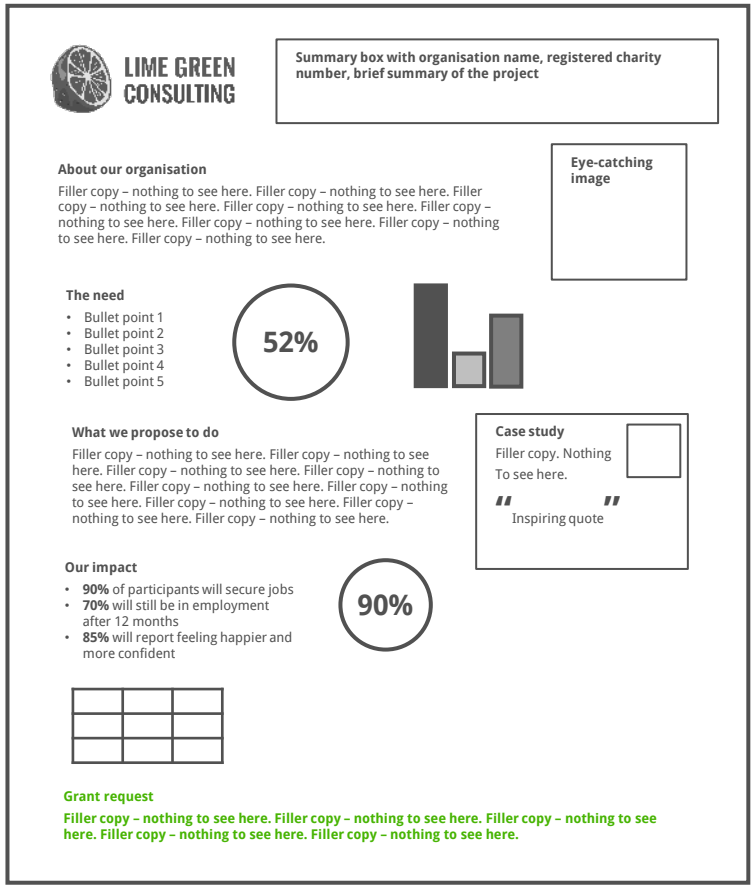

Finish with a clear request

e.g. "We are therefore requesting a grant of £XXXX from <Funder Name> towards <very briefly recap on your project and impact>"

Ensure your contact details are given if not contained in a cover letter…

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Address line 1
Address line 2
Address line 3
Address line 4

Dear Named Contact,

Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here. Filler copy – nothing to see here.

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Please do not hesitate to contact me...

Yours sincerely,

Named Contact

Cover email / letter – max. 1 page

This is an opportunity to:

- Very briefly summarise your project / ask
- Mention any previous grants & reiterate your thanks
- Very briefly summarise why you think you're a good match

- Tailor it to the specific funder, using correct named person and title(s)
- Make your contact details clear

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A BRIEF WORD ON USING A.I.

Before handing your precious organs over to a data centre, consider…

- **Originality**
- **Accuracy**
- **Environmental Impact**
- **Data Privacy**

…and remember that the biggest wins usually come through prioritising relationships, not robots.

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I'll now be heading over to the attendees' chat page to answer any questions...

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