



**Maximising your
charitable grant
opportunities with
Sovereign Housing
via The Good
Exchange**



Sovereign
Introduction and
welcome

Diane Humphries –
Community
Development Officer

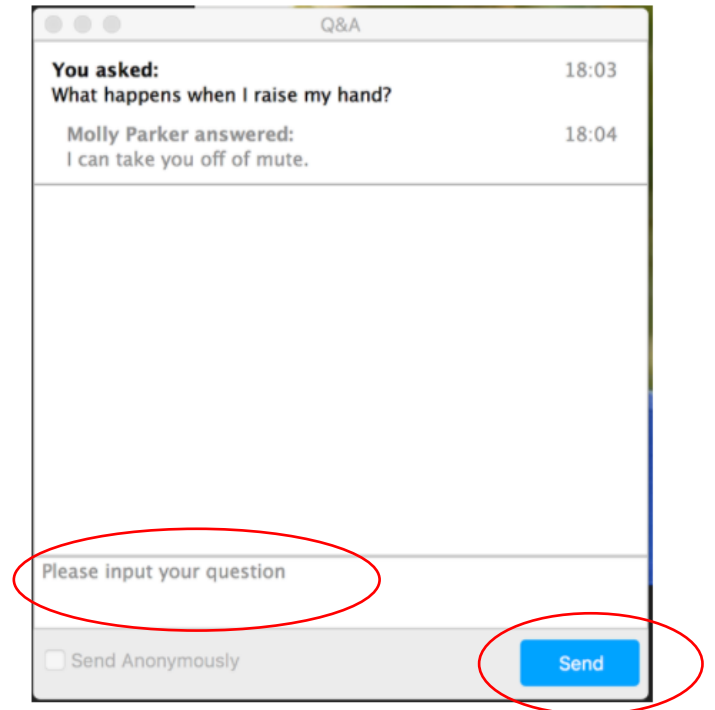
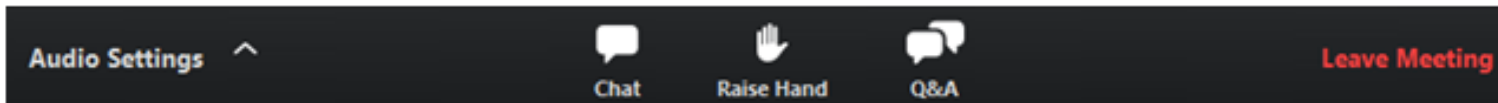


Agenda

Agenda Item	Presenter
Intro & Welcome	Diane Humphries, Community Development Officer, Sovereign
The Good Exchange Introduction Sovereign Community Grants 2020-21 Funding Overview	Marina Stedman, Head of Marketing, Greenham Trust
Sovereign Community Fund 2021-2022 Community Fund Themes and application deadlines - How to apply? Sovereign's Approach to Community Funding	Rachel Peters, Community Development Officer, Sovereign
What kind of projects does Sovereign support? Top tips to attract Sovereign funding	Rachel Peters, Community Development Officer, Sovereign
External Speakers What difference do grants like Sovereign's mean to us? Match funding – how to attract grants and donations? How to maximise your fundraising?	Julie Cobbet – Volunteer and Trustee – Newbury Soup Kitchen Dominique Cadiou – Head of Fundraising at Aspire Oxford
Using The Good Exchange for Fundraising Activities: How to get started and share your fundraising activity Common Questions including how to claim Gift Aid?	Misha Wallace, Client Support Manager and Marina Stedman, Head of Marketing The Good Exchange
Summary of Sovereign Community Development Officer Support and Wider Offers	Amy Houghton, Community Development Officer, Sovereign
Sovereign Social impact	Andrew Cooper, Head of Business Development and Fundraising, Sovereign
The Good Exchange – Resources and Support	Marina Stedman, Head of Marketing, Greenham Trust
Q&A	Panellists

How To Ask A Question During the Forum

- Forum attendees are muted so questions are typed rather than spoken
- Click on the “Q&A” button in your Zoom Tool Bar
- Type your question(s) in the box at the bottom of the pop-up window
- Click the **Send** button
- We will be notified that someone has asked a question and will answer it in the Q&A session at the end.
If we don't answer your question at the time, we will answer it after the Forum.



Introduction to The Good Exchange

Sovereign Community Grants 2020-21 Funding Overview

Marina Stedman

The Good Exchange

Visit Sovereign Housing's Funder Page on The Good Exchange Platform here:

<https://app.thegoodexchange.com/funders/10874/sovereign-housing-association>

Sovereign Community Grants 2020-2021

This summary separates the funding partners, between Sovereign's Grants and other funding partners and public donors on The Good Exchange.

50
Projects backed

86
Funding Partners

660
Public Donors

£5,675
Average Grant

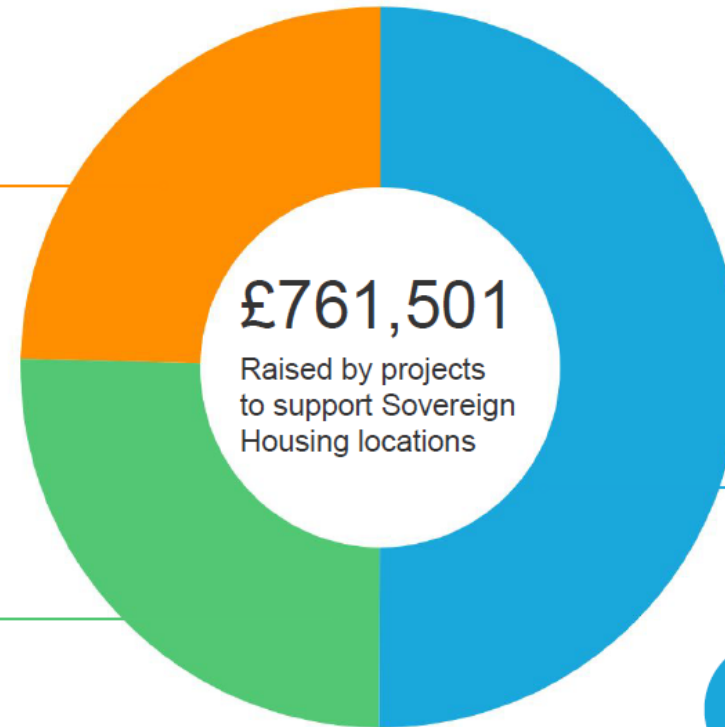
£218
Average Donation

£129,864

Pledged by SOVEREIGN HOUSING

£143,602

Donated by the PUBLIC



£488,035

Awarded by The Good Exchange FUNDING PARTNERS



For every £1 pledged by Sovereign Community Grants the public and other Good Exchange funding partners have pledged £4.82



Projects Funded by Sovereign



Sovereign
Community Fund
21-22
Rachel Peters
Community
Development Officer





Overview

- 2 rounds
- Up to £90k to allocate
- Round 1: Health and Wellbeing now closed and in process of being awarded
- Round 2: Community Cohesion and growth, opens 1 September and closes 31 October
- Will focus on our whole geography, including Hampshire, Devon, Dorset, IOW, Bristol, Gloucestershire, Wiltshire, Oxfordshire and Berkshire



Round 1

- 1 May – 30 June 2021
- Approx. £45k
- Health and wellbeing
- Successful projects awarded by end of July



Round 2

- 1 Sept – 31 Oct 2021
- Approx. £45k
- Community cohesion and growth
- Successful projects awarded by end of November



Eligibility

- Benefit Sovereign residents
- Operate within a 3-mile radius of Sovereign housing areas properties
- Across the South and South West of England
- Capital and revenue projects and projects with elements or a combination of both
- Sovereign Community and resident led projects will be favoured
- Match themes of round
- Project must be on platform and live by round deadline to be matched



Expectations

- Able to demonstrate who they are aiming to support / reach with the project
- Able to effectively measure the outcomes of the project and share this with us – e.g. number of volunteers involved in the project
- Able to demonstrate impact (Social value)
- Willing to promote our grant via social media
- Willing to provide photos, anecdotal feedback and stories relating to the impact of your project

Our awarding process

Round end – first shortlist done by Good Exchange using match criteria

Working group shortlist projects

Shortlisted projects sent to CDOs for comment



First shortlist

- Is the project audience in a 3 mile radius of our stock
- Does the project meet our priorities for this round
- Have they had funding from us in last 12 months
- Will the project benefit a significant number of our residents
- Are Sovereign residents involved in the delivery of the project

Our awarding process

Shortlist pack sent to
awarding panel

Awarding panel score
each project
independently

Scores collated and
successful projects
agreed



Awarding panel

- Project goals and objectives are clearly identified and measurable
- Project includes committed community partners and utilises local resources
- Project costs, including management costs or overheads, are reasonable & other funding has been sourced
- Measuring success has been thoroughly considered using appropriate evaluation mechanisms / impact assessment

Top tips

Organisation and
project detail

Location and audience

Measuring benefits /
impact

External
Speakers -
Sovereign
Funded Project
- Case Studies

Newbury Soup Kitchen – Julie Cobbet

Project:

Newbury Soup Kitchen Running Costs 2020-2021. Moving costs and running costs of new Operations Centre. Food, Outreach, and Support for the Rough Sleepers and vulnerable in our Community.

How much was raised via The Good Exchange?

£33,989 – the project raised all of the funds it needed.

- Grants: £10,399 (inc. **£2,500 from Sovereign**)
- Match funding: £5,000
- Funders: 5
- Public Donations: £16,085
- Gift Aid: £2,505
- Number of donors: 102



“With our new van, new building, expanding outreach and support The Good Exchange Projects make such a difference to us. You have no idea what a difference this funding is for us. It will help us with the costs involved keeping the vans on the road, general running costs and costs relating to a small but expanding local charity. Newbury Soup Kitchen HAVEN (West Berkshire) hopes to grow and move into a permanent building of our own when we will then continue our work helping anyone in food poverty and vulnerable. It is not just about Soup!! Thank you.”

Meryl Praill, CEO and Founder, Newbury Soup Kitchen.

Open Day with Will Young: <https://newburysoupkitchen.org.uk/youtube-channel/>

Newbury Soup Kitchen



Aspire Oxford

Fundraising for three projects via The Good Exchange

- STRIVE: Providing Sports Activities to highly disadvantaged people across Oxfordshire
- Homelessness prevention in Oxfordshire
- Oxfordshire's Gym Bus: supporting disadvantaged people to take their first steps into employment, education or training

Eight Funders agreed to support the projects:

- Sovereign - £6,802
- South Oxfordshire Housing Association - £3,000
- Oxfordshire Community Foundation - £27,725
- Oxford City Council - £11,975
- Miss Lawrence Trust - £2,750
- Greensquare Housing Association - £3,000
- Aster Housing Association - £1,000
- Cottsway Housing Association - £1,000

Total Raised - £57,252

Watch the video here:

[Case Study - Oxfordshire Community Foundation, challenges facing charitable funders today \(thegoodexchange.com\)](https://thegoodexchange.com)



Match Funding:

Marina Stedman –
Head of Marketing,
The Good Exchange

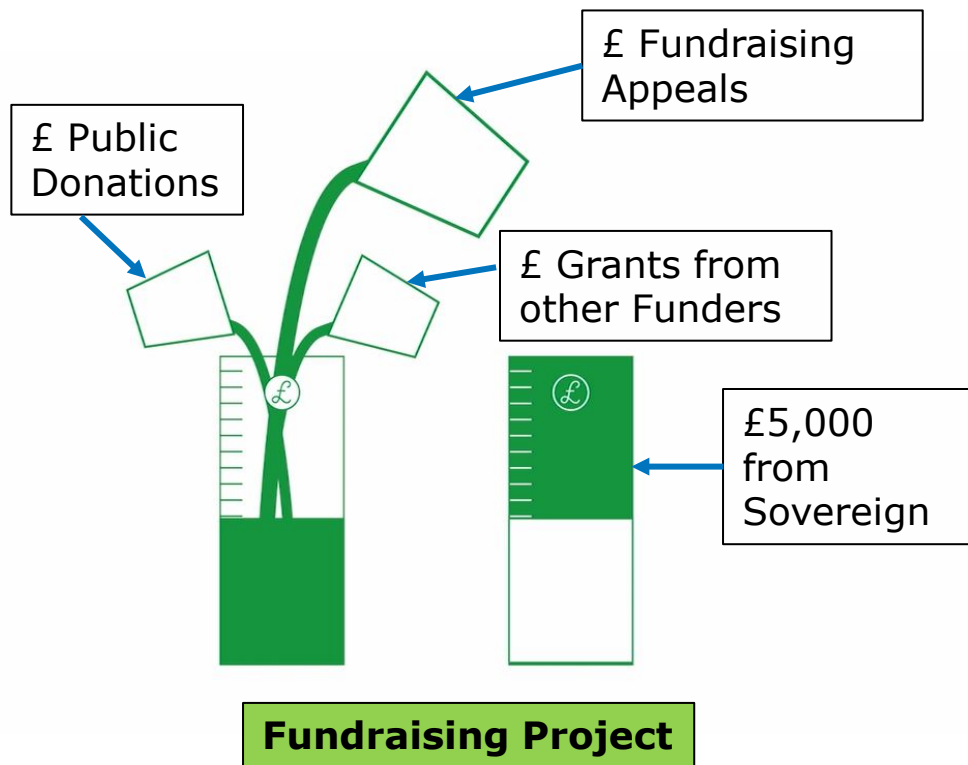
What is Match Funding?



- A funder offers a defined grant to a fundraising project over a defined time period
- The money is paid to the fundraising organisation when matched with:
 - Donations
 - Monies raised by fundraising activities
 - Other grants (at Funder discretion)

Use it or lose it – Proactive campaigns needed to drive donations & fundraising to use the Match Funding money!

What is Match Funding - Example



£10,000 Raised !!!

- A Funder offers a £5,000 match funding grant to a charity for their Fundraising Project to be matched £1 for £1
- Every £1 that is donated or raised for their Project becomes £2
- If the charity raises £5,000 for their Project, they will receive £10,000 in total
- Made up of: £5,000 from the Funder's Grant and £5,000 from donations, fundraising (& other grants)
- Match Funding via The Good Exchange is matched immediately and paid out according to the platform's standard payment schedules

See the Newbury Cricket Club project here: [Newbury Cricket Club - Clubhouse Redevelopment](https://thegoodexchange.com/projects/newbury-cricket-club-clubhouse-redevelopment). (thegoodexchange.com)

Match Funding National Rheumatoid Arthritis Society

- NRAS was fundraising to be able to keep their helpline open and free of charge for rheumatoid arthritis and juvenile idiopathic arthritis sufferers
- A local business had nominated the charity to be their 'charity of the year' and planned to donate all funds raised by employees from events & other fundraising activities
- By making their donation to NRAS via The Good Exchange, their corporate partner's money was matched by a local funder

"The match funding was a really big incentive for us because we had a really good relationship with our charity of the year business who were quite happy to pay the money they raised [from their employee's fundraising activities] through The Good Exchange and that almost doubled the donation for us."



Helen Saich, Trust & Company Fundraiser

Watch the video here:

[Success story - Case Study National Rheumatoid Arthritis Society \(NRAS\) \(thegoodexchange.com\)](#)

Using The Good
Exchange to Promote
your Fundraising –
Tips & Tools:

Misha Wallace – Client
Support Manager, The
Good Exchange

Getting started on The Good Exchange

Three steps to joining and using The Good Exchange:

1. Personal Account	Create a personal account that you will use to log-in (unique to you as an individual) https://thegoodexchange.com/login
2. Organisational Registration	Register your organisation (what your charitable organisation does generally, for whom & where it does it)
3. Fundraising Project	Create and submit a fundraising project (your grant application, fundraising and donations page)

How to Register on The Good Exchange: <https://thegoodexchange.com/resources/register-applicant-organisation/>

How to Create a Fundraising Project: <https://thegoodexchange.com/resources/create-fundraising-project/>

Using The Good Exchange to reach specific funders and crowdfund

Project submitted, reviewed & live on The Good Exchange

Project acts as one single application, matching automatically to ALL eligible funders who review & shortlist according to their funding timelines & criteria

Funding offers sent via platform emails.
Review/sign/upload Ts & Cs and accept offers via the Applicant Dashboard

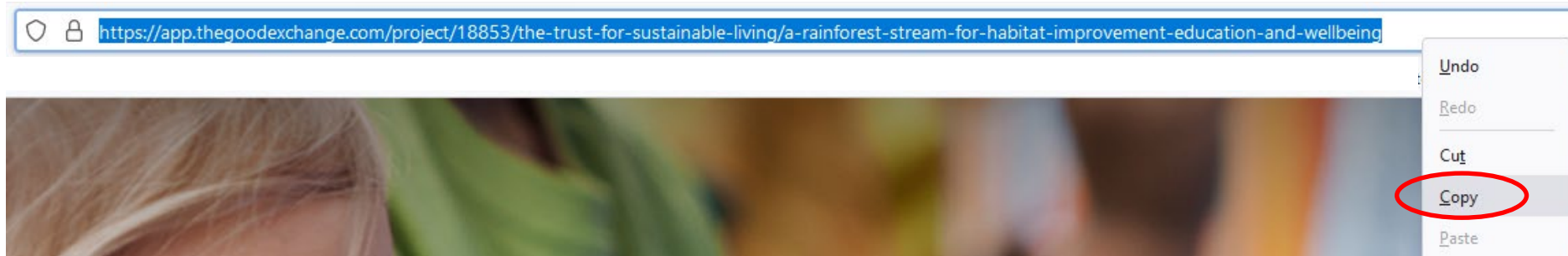
At the same time **Donations** can be made by individuals & businesses and proceeds from **fundraising** activities paid in (via your project page). These may be matched if match funding is available).

**Sharing your live project page to
encourage donations**

Sharing the link to your project page

Direct donors and fundraisers straight to your project by sharing the project link in one of the following ways:

- Copy the unique link to your project page and paste it into social media posts; emails; e-newsletters; your website and more. *NB: Before doing this, ensure that you are logged out first, then find your project using the Search function on The Good Exchange. If you share a link whilst logged in, it will not work.*




- Share your project page directly on your organisation's social media pages (immediately or in scheduled posts) and with your WhatsApp contacts on your mobile using the [Share](#) icon on your project page. *NB: Links in Instagram posts cannot be copied or clicked on, you will need to update the link in your organisation's Instagram bio on the day.*




When you share your project page link, don't forget to let everyone know if you have match funding in place as this can act as a great incentive for people to donate!

Your live project page – Match Funding and donations

Donors can see exactly how much you need to raise and any match funding available from your project page.

Raised **£6,105** of **£28,350**
 Closes 31st July 2021
 21%
 There is £22,245 left to raise



Match Funding

Funder	Offered	Remaining	Match Donations	Match Grants
Greenham Trust Ltd	£4,250	£4,100 ⓘ	✓	
The Miss Lawrence Trust	£2,000	£1,970	✓	✓
Total	£6,250	£1,970		

Amount Received

Grants	£3,200
Donations	£180
Gift Aid	£25
Match Funding	£180
External	£2,520

Funder 1 offer

Funder 2 offer

Look out for the Match Funding symbol

Use this information to keep your supporters up-to-date

Include info about match funding in communications

Match Funding on public donations

1. When donating, donors can see that their donation has been matched.
2. If available, donors can tick the Gift Aid box for an extra 25% (on the donation only and if applicable)
3. Ask your donors to **share their donation and the fact that it has been matched** on social media

Donate

How much would you like to donate?

£10 £20 **£30** £50 £100

£ Other amount

While all of your donation is passed to Life Education Wessex & Thames Valley, charitable organisations pay a small platform service fee to use The Good Exchange.

Would you like to contribute towards this fee, reducing the amount that Life Education Wessex & Thames Valley pays?

Yes. £1.80 (Based on fee rate)

Your donation	£30.00
Your contribution	£1.80
Matched Funding by The Miss Lawrence Trust	£30.00
Total to pay	£31.80
Total to organisation	£60.00

Thank you for your donation
Your donation of £30.00 means Life Education Wessex & Thames Valley will receive **£60.00!**

Matched Funding by The Miss Lawrence Trust	£30.00
Total	£60.00

Donors can opt in to be thanked by you for their donation. You can access their email address and all financial activity (Donations, Matched Funding, Gift Aid, Grants, Payments etc) via your **'Activity Report'** in your Dashboard.

<https://thegoodexchange.com/help-support/#activity-report>

Ask your supporters to share their donation on social media. Share on WhatsApp - available on mobiles only.







Donate

Step 4 of 4

Thank you for your donation
Life Education Wessex & Thames Valley appreciates your donation of **£30.**

I am happy for The Good Exchange to share my name and email address with Life Education Wessex & Thames Valley so that they can personally thank me.

-  Share on Twitter
-  Share on Facebook
-  Share on LinkedIn
-  Share on WhatsApp

- Organisation
- Draft Applications
- Approved Projects
- Reports**

Activity Report

[Create Activity Report](#)

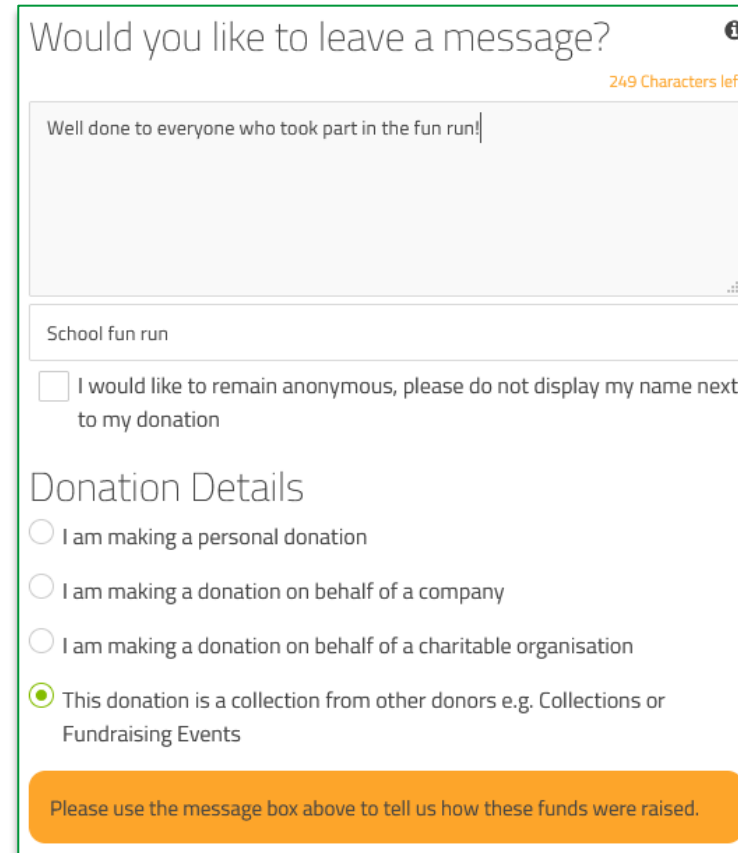
Here you can create a report to show all activity per project including grants, match funding, public donations and gift aid.

Adding Proceeds from Fundraising Events and Collections

You can add the proceeds from your own fundraising events/activities as donations on your project. Select **Donate Now** on your project page to add your funds *via credit/debit card or BACS*. Be sure to state how the funds were raised in the *Message* field.

- Takes advantage of any match funding in place on the project (for eligible donations)
- Incurs a platform fee (which the donor can contribute to)
- Visibility of support from external funders attracts other funders to give to your project(s) and incentivises donations

Please check any funder T&Cs carefully for any restrictions on what will be matched.



Would you like to leave a message? 249 Characters left

Well done to everyone who took part in the fun run!

School fun run

I would like to remain anonymous, please do not display my name next to my donation

Donation Details

I am making a personal donation

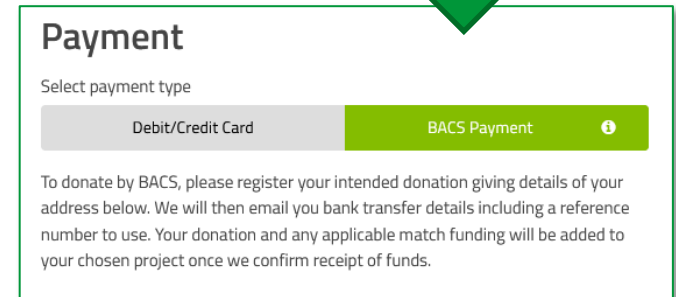
I am making a donation on behalf of a company

I am making a donation on behalf of a charitable organisation

This donation is a collection from other donors e.g. Collections or Fundraising Events

Please use the message box above to tell us how these funds were raised.

BACs payment option available during donation process.



Payment

Select payment type

Debit/Credit Card **BACS Payment**

To donate by BACS, please register your intended donation giving details of your address below. We will then email you bank transfer details including a reference number to use. Your donation and any applicable match funding will be added to your chosen project once we confirm receipt of funds.

Read more on **How to Donate** here: <https://thegoodexchange.com/help-support/#make-a-donation>

How to Allow The Good Exchange to Claim Gift Aid on Your Behalf

giftaid

What is Gift Aid?

Gift Aid is a scheme that allows charities and Community Amateur Sports Clubs (CASCs) to claim from HMRC, the basic rate of tax their donors have paid on top of their donation.

Gift Aid explained...

If you make a donation and you tell us that you pay tax in the UK we can claim back 25% from the Government. **That's 25p for every £1 you give.**



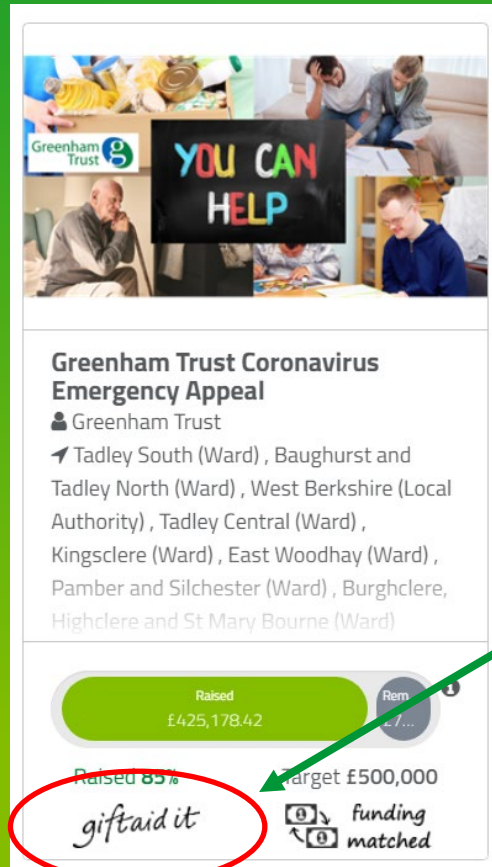
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Restrictions

- Donors must be **tax paying individuals** (companies cannot claim Gift Aid)
- Collections are not eligible for Gift Aid.

To allow The Good Exchange to collect Gift Aid on behalf of your organisation you must tell us about your Gift Aid status and nominate us to act as an agent.



Organisations on The Good Exchange claiming Gift Aid



Greenham Trust Coronavirus Emergency Appeal
Greenham Trust
Tadley South (Ward), Baughurst and Tadley North (Ward), West Berkshire (Local Authority), Tadley Central (Ward), Kingsclere (Ward), East Woodhay (Ward), Pamber and Silchester (Ward), Burghclere, Highclere and St Mary Bourne (Ward)

Raised £425,178.42 Rem 1...

Raised 85% Target £500,000

giftaid it  Funding matched 

- 2000+ Organisations
 - 700 Registered Charities and CASCs
 - Only **30%** are claiming Gift Aid
 - **70%** missing out!!!

giftaid

1. Check project search page
2. Email support@thegoodexchange.com for guidance on how to register

Note: All Gift Aid transactions are available in the applicant activity report.

<https://thegoodexchange.com/help-support/?q=gift+aid#claim-gift-aid>

How public fundraisers can support your project

A **Fundraiser** on The Good Exchange is a member of the public or corporate team who undertakes a fundraising activity in support of your project.

Public supporters can help raise funds for your project by clicking **Become a Fundraiser** on your project page, setting up a **Fundraiser Profile** and undertaking a fundraising activity of their own. They can share their Fundraiser profile with friends/family to encourage donations.

Fundraisers can really help to attract donations on your project and utilise any match funding in place as any funds coming through to their profile page will also come through to your project and be matched!

How to Support a Project as a Public Fundraiser: <https://thegoodexchange.com/help-support/#fundraising-activity-guide>

Fundraiser Case Study: <https://thegoodexchange.com/resources/imogen-dental-ark/>



Sovereign Community
Development Officer
Support and Wider
Offers
Amy Houghton
Community
Development Officer



The Communities Team

Communities

- Social Inclusion
- Grass roots funding and capacity building
- Environmental Programmes
- Health and well-being
 - Ageing Well
 - Young People

Business Development/ Money & Digital

- Fundraising and developing new services
- Social Impact & Social Value
 - Digital Inclusion
 - Financial Inclusion

Employment and Training

- Employability support
- Work and Better Work Programmes
 - In-work Support
 - Apprenticeships
- Vocational Training
- Business Start-up support



Community Development Team

What is it?

The Community Development Team can offer support to residents, community groups and charities in our communities offering services for our residents.

Tell me more . . .

The team can support with:

- Grants and Project Funding
- Support with The Good Exchange application
- Support with Community Action
- Opportunities for Community Involvement
- Training opportunities
- Information on Partnerships
- Community Centre Support
- Advice with Environmental Projects
- Guidance with Community Group Governance

How can I find out more?

Email community.development@sovereign.org.uk

or visit <https://www.sovereign.org.uk/thriving-communities>



What else?

- Sovereign Youth Panel - <https://www.sovereign.org.uk/youth-panel>
- Live Well Focus Group
- New Neighbourhoods
- Environmental Projects Team
- Your Community Your Choice - <https://www.sovereign.org.uk/your-community-your-choice>

Social Impact
Sovereign's Approach
Andrew Cooper –
Head of Business
Development and
Fundraising





What is Social Impact?

- Social impact is the effect on people and communities that happens as a result of an action or inaction, an activity, project, programme or policy
- When measuring Social Impact, it's good practice to consider:
 - How sustainable is this change
 - How many will benefit and who are they?
 - How will they benefit?



How we 'value' our impact

- We use HACT's Wellbeing Valuation to value the impact of our work in communities
 - A monetary value is placed on a 'bank' of different wellbeing boosting activities.
 - We use HACT because they're the industry standard for housing and have monetary values for housing related activities.
 - Monetary values are helpful because as they are widely understood
 - We can upload it to an online tool which generates a report showing our impact in different areas.

— You can find out more on this link: <https://www.hact.org.uk/hact-value>

**Frequent Moderate
Exercise has an average
value of £4,179 per
person per year**

**Other values include:
Volunteering – £3,249
Feel belonging to
neighbourhood - £3,753**





Our approach to Social Impact

- Sovereign recorded £24 million in Social Value through in 2021/21
- In 2021/22 we are expanding this and want to deliver £30million in social value to our communities



Why is Social Impact important?

- Helps us understand where and how we make the most positive change
- Enables us to hear the voice which matters most – we discover from people what changed for them and why it mattered
- Brilliant tool for communicating to internal and external partners and monetary proxies are often useful to symbolise the levels of change
- Helps to secure funding and contracts
- Creates a competitive edge and a point for knowledge share with similar organisations
- Tells the story of what we do and why we do it



Social Impact in Funding Bids

- It's the 'so what' – e.g. the project will support 10 people back into work. This gives Potential for £140,443 for 10 full time jobs – say the project cost £1,400 – that's a 1:100 return on investment. You might also use other wellbeing measures increasing the understanding of the impact.
- Funders want you to be able to demonstrate your impact

Resources & Support

More about Sovereign Housing Association as a Funder on The Good Exchange (their Funder page)	https://app.thegoodexchange.com/funders/10874/sovereign-housing-association
More about the work of Sovereign in the local community	https://www.sovereign.org.uk/
How to Register on The Good Exchange and add your Fundraising Project	https://thegoodexchange.com/resources/register-applicant-organisation/
How to set up Gift Aid on The Good Exchange	https://thegoodexchange.com/help-support/#claim-gift-aid
How to Accept a Match Funding Offer on The Good Exchange	https://www.youtube.com/watch?v=B_T-JSPNw8U
How to Support a Project as a Public Fundraiser on The Good Exchange	https://thegoodexchange.com/help-support/#fundraising-activity-guide
The Good Exchange - Fundraiser Case Study	https://thegoodexchange.com/resources/imogen-dental-ark/
How to Donate to a Project on The Good Exchange	https://thegoodexchange.com/help-support/#make-a-donation
How to add Externally Raised Funds to a Project on The Good Exchange	https://thegoodexchange.com/help-support/#add-external-funds
The Good Exchange Help & Support Page (FAQs; Videos; Help Articles; User Guides; Contact Form)	https://thegoodexchange.com/help-support/
Fundraising Tools & Resources	https://www.youtube.com/thegoodexchange

Questions and Answers

Thank You