<u>Fundraising Action Group 2.0</u>

The following document describes the structure for the Fundraising Action Group, including financial payments. This is a trial process and may be altered, paused or stopped at anytime without notice. If this does occur, all financial commitments made under this current proposal at that time will be honoured.

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Aim

To generate vital funds for the World Cetacean Alliance to carry out its charitable objectives.

Objective

The priority of the Fundraising Action Group in the short term will be to submit funding applications to trusts and foundations. The team will work to a standard process and record individual and group progress on a regular basis (weekly to start with in order to create momentum and an atmosphere of progression).

Proposed process

The following is the proposed process that the Fundraising Action Group should follow when applying for grants from trusts and foundations. This process is for guidance only and can be adapted for different scenarios and as its effectiveness becomes evident.

1. Living Google Doc of potential funders should be researched and categorized in terms of relevancy and priority (see Grant Priority section). This document should be updated regularly to track progress and avoid duplication of work by team members.

2. Unless there is justifiable reason not to, and where possible, the first step should be to find contact details of a key person in the grant giving body that we can make contact with.

    a. Send them an introductory email with short summary of the WCA's work that is most relevant to their interests and ask if the CEO could have a call or meeting so that we can tell them a little more as we believe it's aligned with their mission and/or ask for more details about their current funding priority areas.
        i. Using WCA funding menu to identify relevant areas of WCA work
        ii. Contact Secretariat for assistance, as needed, with identifying key WCA areas of work that may be most relevant.
        iii. Use template email but adjust as necessary to reflect the grant giving body's focus areas/ key words.
    b. Follow up as necessary 7 days after contact either by email or phone.

3. If there is a current open call for applications, create a first draft of the application. Using the WCA funding menu or contacting the Secretariat and the fundraising team for additional information as needed.

4. Once a first draft has been created, this should be sent to all members of the fundraising team for review.
    a. Two selected members of the team should review and provide feedback in a timely manner (deadline to be set by member requesting the review, giving at least 7 days for comments where possible).

5. All applications must be sent to the senior team before submission, at least 7 days before the deadline to be reviewed where possible. If the senior team are unable to review they can submit without.
    a. Where possible, applications should be sent to the senior team one at a time to reduce the chance of a backlog.

Additional application requirements

Unless discussed and agreed upon by the secretariat, all grant applications must:

✓ Be applied for using an @worldcetaceanalliance.org email address.
✓ Include a 15% administration fee in the project budget.

Grant priorities

Priority should be given to grants that:

✓ Supply funds for core costs or are unrestricted.
✓ Supply funds for projects involving WCA Partners.
    o Only where the WCA Partner(s) will receive funding to carry out the grant requirements (including Brighton Dolphin Project as a proxy WCA Partner)

Lead authors on successful grants that meet either of the above criteria will receive the *priority grant bonus fee*.

Additional priority areas that should be considered (but are not financially incentivised are grants that:

✓ Have looming deadlines and/or have a fast turnaround for releasing funds.
✓ Supply funds that can cover two or more of the WCA's project areas.

Small grants

Grants with a value of less than £1000 are of low priority and should therefore have little time invested in them. For grant applications with a value of less than £1000, authors and reviewers will be paid the flat commission fee at the point of application but will not receive a bonus even if successful.

Financial reward structure

Members of the fundraising team will be provided with:

a) A flat fee on completion of specific tasks within the role at the **point of application**.
b) An additional bonus commission that will be paid to the lead author if the **grant is successful.**

Fee at point of application

Action	Commission
REVIEWER: Review one funding application. ✓ Reviewers must edit, provide feedback, and assess against the criteria of the grant using track changes. ✓ A maximum of two reviewers will be paid for each application. These will be on a first come first serve basis.	£25
LEAD AUTHOR: Write and submit one application (including incorporating feedback from the two designated reviewers)	£50

Bonus on grant success

Grant amount	Priority area grant bonus fee	Non-priority grant bonus fee
£1,000 - £2,000	£200	£140
£2,000 - £5,000	£200	£140
£5,000 - £10,000	£500	£350
£10,000 - £20,000	£1,000	£700
£20,000 - £50,000	£2,000	£1,400
£50,000 - £100,000	£5,000	£3,500
£100,000 +	Discuss with Secretariat	

- Each member will log their actions on the shared Google drive document and invoice the WCA accordingly at the end of each working month.
- The WCA has the right to withhold payment if it is evident that the team member has made deliberate attempts to invoice for work that was they have:
  - Not completed
  - Not completed to a reasonable standard
- Payment of the grant bonus fee will only be made to the lead author once the funds appear in the WCA bank account.
  - Where funds are paid in installments the WCA will endeavor to pay the lead author the full bonus amount immediately but reserves the right to pay in installments as necessary.

General expectations

- ✓ WCA secretariat and trustees commit to supporting the discussions in this group and timely responses to questions and materials for comment.
- ✓ Group members commit to an estimated [change depending on remit] 3 hours a week short term responsibility to be used to forward the remit of the group.
- ✓ Group members agree to interact in a respectful manner to other group members and to work through differences of opinion professionally.
- ✓ Progress of the group will be considered two-weeks post-creation and at this point participants can consider their role and future involvement as appropriate. Further reflection on group activity, effectiveness and involvement will occur monthly for the first three months and every three months after that.
- ✓ Groups commit to providing a summary of discussions and actions completed by the group once every three months and once upon closure of the advisory group to be circulated to the new GC and partnership. This must include any impacts the group made against the WCA Strategic Pillars.

Specific expectations

- ✓ Group members agree to share all work completed under the remit of this action group with the WCA Secretariat on exit from the group or more regularly as needed.
- ✓ The WCA Secretariat will review the progress of the group and can dissolve the group if they see fit, giving a 7 day notice to all members.
- ✓ Group members are expected to provide work to the best of their ability.
- ✓ Group members are expected to apply only for those grants that are relevant to the WCA's work. Financial payment will not be given to those applications written where there is no relevance to the WCA.
- ✓ The WCA Secretariat will consider training opportunities under the remit of the group on a case by case basis.
- ✓ Group members are expected to let the WCA Secretariat know as soon as they are unable to fulfill their role within the group.