



UK Aid Match II Round 3

Communications and appeal application guidance

Information to help guide you through the design of your appeal and the communications section of your application

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1. Overview

UK AID MATCH will **only** consider:

- Applications from appeals that comply with relevant legislation and good practice for charities in fundraising, marketing and advertising, from bodies including the Charity Commission, Information Commissioner's Office, Fundraising Regulator (or Scottish Fundraising Standards Panel for civil society organisations [CSOs] registered in Scotland only), the Institute of Fundraising and Advertising Standards Authority. All appeals must comply with the Code of Fundraising Practice
- Applications from organisations that are registered with the Fundraising Regulator (except CSOs registered in Scotland only)

Some helpful resources include:

- The Code of Fundraising Practice can be found here: <https://www.fundraisingregulator.org.uk/code>
- Information about registering with the Fundraising Regulator can be found here: <https://www.fundraisingregulator.org.uk/registration/registering-fundraising-regulator/>
- Information about the Scottish Fundraising Standards Panel can be found here: <https://www.goodfundraising.scot/>
- The Advertising Standards Authority has a number of guides for CSOs, including a best practice guidance for charity advertising <https://www.asa.org.uk/advice-online/voluntary-sector-advertising.html>
- Information about the Charity Commission and fundraising can be found here: <https://www.gov.uk/topic/running-charity/fundraising>
- Information about the Information Commissioner's Office and charities can be found here: <https://ico.org.uk/for-organisations/charity/>

To meet the minimum standard for UK Aid Match, an appeal must:

- Seek to raise at least £100,000, within a three-month appeal period. Donations must be from people (not businesses) living in the UK and go towards an eligible international development project or support the charity's wider activities
- Communicate clearly to the UK public what their money and the match funding will achieve
- Include the 'UK Aid Match message' clearly in all appeal communications – that all public donations will be doubled/matched by the UK government - and use the UK Aid Match logo on all applicable communications activities with appropriate messaging. Please note that there is a flag-free version available for use in Northern Ireland – if you require it please email: ukaidmatch@mansiondaniels.com
- Use a pro bono communications partnership (see section four, [communications partnerships](#)) with one or more organisations that can confidently provide at least 400,000 unique opportunities to view (OTVs) through a variety of channels. In assessment, we will take into consideration to what degree the OTVs are unique. This number should not include the applicant organisation's existing supporter database (e.g. through direct mail or Twitter followers). The first 400,000 OTVs must be provided on a non-commercial basis (i.e. no payment given)
- Identify opportunities for ministerial involvement e.g. attending an event, taking part in a challenge or social media activity. These opportunities must include at least one opportunity for a minister or a local parliamentarian to attend an event celebrating the appeal with the charity and its key fundraisers

- Start (but not necessarily finish) within six months of proposal approval, with the match funded appeal period lasting no more than three months
- Include plans for the organisation and communications partner(s) to communicate, using images, quotes, stories, case studies etc, with the public when the project is underway, to show where money has gone, and how it has improved lives. There must be at least one quality communication but CSOs are encouraged to report to the public throughout the life cycle of the project, for example when milestones are reached. The rate of progress will differ from organisation to organisation, so UK Aid Match will allow some flexibility in how and when a ‘communicating success’ moment takes place
- Where appropriate, include links to Department for International Development’s (DFID's) online presence. For example Twitter, Facebook and .gov.uk website.

We will not match fund appeals that:

- Take a partisan political stance
- Include initiatives which involve direct lobbying of the UK government or of international organisations of which the UK is a member
- Include lobbying for or against activities of specific companies, individuals or institutions
- Promote policies in direct conflict with UK policy on that theme

There is a full list of activities that we can’t fund in the project guidance document.

Funding the appeal

Please note that UK Aid Match funding must be used for the activities set out in your proposal. Taxpayers’ money must not be used for any expenses relating to running the appeal, fundraising, promotion or communications reporting on success. Funding raised by the appeal can be used more flexibly across your organisation’s work.

2. Assessment stages and criteria

This section outlines some of the key areas assessed in a UK Aid Match two-stage application, however, you must read the details in the full guidance carefully before completing your application.

2.1 Concept note stage

As well as meeting fundamental criteria such as length of the appeal, start date and only including eligible countries in your communications activities, your appeal communications will be assessed for:

- **Communications partnerships’ audience reach:**
 - The OTVs provided by both your appeal (minimum 400,000 and proportionate to your fundraising target) and your communicating success activity (reflecting the OTVs and audiences of your appeal) through pro bono communications partnerships
 - The agreement by communication partners to incorporate the UK Aid Match message and logo into all appeal communications to make sure the public are aware of match funding whenever they are prompted to donate
- **Communications partnerships’ frequency and content:**
 - Convincing communications partnership(s) deliver in-depth engagement
- **Communications partners’ commitment to communicating success:**
 - Commitment from partners to share stories of success about the money raised within 12 months of the appeal finishing with OTVs proportionate to the appeal (minimum of 400,000)

- **Fundraising plan:**
 - Convincing plan to raise at least £100,000, with accompanying insight or evidence from previous performance to support your breakdown and targets
- **Appeal messaging:**
 - Messaging that is compelling and makes it clear to the public how their money will make a difference and how UK Aid Match funding will be spent. The messaging must be compliant with the mandatory UK Aid Match messaging guidance ([see below](#)) and reflect the aims of the Narrative Project ([see below](#))
- **Capacity:**
 - The organisation's experience of making this type of appeal or managing similar communications activity. The staff involved should show they have the relevant experience and resource to deliver this type of campaign
- **Additional OTVs:**
 - Other channels to extend the OTVs beyond the minimum 400,000 provided by pro bono communications partners have been considered. These should include the organisation's own channels, any paid for activity and any earned PR OTVs (that are additional to any pro bono media partnerships). These additional OTVs should be appropriate to your appeal and fundraising target
- **Evaluation:**
 - Ability to verify the number of individuals making eligible donations to the appeal and identify which donors are new. The method of collecting data on actual opportunities to view and providing examples of coverage and events relating to the appeal
- **Concurrent activity:**
 - Any concurrent public-facing communications activity from the organisation must not clash with the UK Aid Match appeal or confuse audiences, whether these relate to fundraising, influencing the UK government or raising awareness
- **Communications partnership letters of support:**

Applicants must include at least a provisional agreement with each of its communications partner(s) in writing (email or letter). This should include:

 - A statement of interest to support the UK Aid Match appeal free of charge, if awarded
 - A commitment to use the UK Aid Match message and logo in all related content
 - An estimate of the OTVs for each of the channels that they can guarantee for the appeal (e.g. readership, listeners, demographics, etc.), by giving details about each channel, audiences and reach – independently verifiable where possible
 - An outline of the content and channels that they will provide, as well as the volume and frequency (e.g. three articles over three months, number of Facebook posts, etc.)
 - A commitment to share content that communicates the success of the campaign after the appeal ends and describes how the money raised is hard at work, within 12 months of the appeal ending

2.2 Full proposal stage

Your communications plan must demonstrate that you are ready to run an appeal. It will be scored considering:

- **Well thought-out targeting of audiences.** We will look for evidence that you:

- Take a strategic approach to targeting your audiences for the appeal
 - Ensure a mix of existing and new audiences to target with communications (not just as donors)
 - Ensure a convincing and creative selection of communications partners and channels that will help you reach these audiences and that the mix of channels and content will reach and appeal to these audiences
 - Have considered the barriers to reaching your audiences and how to overcome them
- **Quality and depth of engagement.** We will look for evidence that you:
 - Have a high frequency of content with your pro bono communications partners, that is appropriate to your appeal and target. The higher the volume and the deeper and broader the reach the better (vs an isolated, single opportunity)
 - Demonstrate an ability to reach new audiences
 - Ensure your partners provide opportunities to view that are meaningful and effective, and bring more than audience numbers to your appeal
 - Equip partners with what they need to deliver your appeal
 - Give your audiences the opportunity to actively engage with, share and discuss appeal content
 - Engage your audience with the issues beyond donating
- **Strength, creativity and clarity of messages.** We will look for evidence that you:
 - Develop main messages about sustainable development rather than traditional 'aid'. For example, messages and content that demonstrate how, with a little help, people can be empowered to support themselves and their communities' long term. Furthermore, whilst messages can outline a problem, your communications should focus on how this campaign will help overcome that problem.
 - Make sure your appeal gives beneficiaries a voice and/or portrays them in a dignified, empathetic manner, rather than as helpless or incapable, or with endless need – both in images and copy
 - Ensure your UK Aid Match messages comply with the mandatory messaging required and emphasise that public support enables match funding to take place. It must be clear that donations will be doubled
 - Demonstrate how your UK Aid Match messages are well integrated. Consider testing them with your audiences
 - Help advance the argument that 'development works' with messages that engage the public
 - Ensure a potential donor knows what their donation will be used to achieve and what the UK Aid match funding will be used to achieve – especially when they are different. It must not be misleading or confusing.
 - Have created a compelling ask that is clear about how the lives of poor people will be improved with creative ways to engage your audiences to support the appeal, such as case studies and money buys. Messages about what money will buy must be consistent with your programme bid
 - Keep communications partners on message, for example by giving them a 'song sheet' or message framework/platform to use
- **Plan of delivery.** We will look for evidence that you:
 - Create a well thought-through plan of activity that will maintain momentum throughout the duration of your appeal
 - Have a range of activities to engage your donors and audiences – that are suitable to the objectives of your appeal and your audiences

- Have not only considered the channels and content but also the angles, hooks and ideas that will sustain public interest
- Include local and parliamentary engagement opportunities in your plan of activity, including with the local community and MPs
- Have ways for supporters to engage peers and become advocates for the appeal
- Adequately consider the resources needed
- **Other OTVs.** We will look for evidence that you:
 - Include a range of opportunities to increase the reach of your appeal through additional OTVs that are appropriate to your appeal and target
 - Incorporate your own channels to reach audiences and, where appropriate/possible, have included paid-for activity
 - Maximise all earned PR OTVs and explore all the opportunities from regional, trade and national media that your appeal offers
- **Concurrent public facing activity.** We will look for evidence that you:
 - Manage any other concurrent activity that may confuse your audiences to ensure they have a clear idea of what UK Aid Match is
 - Ensure that audiences are clear about when a communication or activity will be doubled by UK Aid Match
- **Evaluation metrics and reporting.** We will look for evidence that you:
 - Consider the most effective ways to measure the impact and outcomes of your appeal for both communications and fundraising activity
 - Can be clear about which of the metrics listed in the C1 form you are able to provide
 - Look for opportunities to measure the impact of UK Aid Match on your audience's support for the appeal
- **Reputational risk management.** We will look for evidence that you:
 - Can identify risks to reputation (as opposed to operational or delivery risks)
 - Have appropriate processes and approaches in place to prevent them from happening and to respond if a negative issue arises
- **Communicating success back to the public.** We will look for evidence that:
 - You have a credible plan to communicate success to the public about their response to the appeal and about how UK aid is being used. The plan complies with the timing requirements (see summary plan below), and your partners are also committed
 - The plan includes the types of content and channels you will use
 - You are including opportunities to hear from people who are benefiting or who will benefit
 - All people included in your materials and content, whether members of staff, the public or beneficiaries, give appropriate permission for this use. Please consider both safeguarding best practice and General Data Protection Regulation (GDPR) compliance when sharing people's stories
- **Letters/emails of commitment from communications partners.** The final letters need to:
 - Demonstrate that any provisional agreements have been formalised in writing (email, letter), and provide any details that have changed since concept note stage
 - Include additional partners that have been added at the full proposal stage. However, if there is a substantial change in partners between the concept and full proposal stage, the quality of your communications partnership will have to be reassessed for

eligibility and your proposal may not be considered. Additional partners can be added should you be successful, including while your appeal is running, providing they are agreed by UK Aid Match. The partner must be fully aware that your funding will be awarded on the premise that their part in your appeal communications plan is delivered in full, and it is your responsibility to hold them to account

- Include:
 - A statement of interest to support the UK Aid Match appeal free of charge, if awarded
 - A commitment to use the UK Aid Match message and logo in all related content
 - An estimate of the OTVs for each of the channels they can guarantee for the appeal (e.g. readership, listeners, demographics, etc.), by giving details about channel audiences and reach – independently verifiable where possible
 - An outline of the content and channels that they will provide, as well as the volume and frequency (e.g. three articles over three months, Facebook posts, etc.)
 - A commitment to share content to communicate the success of the campaign including the amount raised three months after the appeal ends and how the money raised is hard at work within 12 months of the appeal ending

3. Fundraising

Donations

UK Aid Match will match financial donations from members of the UK* public up to a maximum of £2 million per appeal (subject to due diligence assessment).

To be eligible for matching, donations must be the result of an informed decision to donate to a match funded appeal (i.e. where the donor has been made aware of both the appeal's purpose, and the government match funding).

Grace period

UK Aid Match appeals can run for a maximum of three months. After the appeal has finished, we allow a grace period of two months to allow fundraisers to collect donations and hand them over to the charities. Any new (as opposed to already pledged) donations that are made in the grace period will not be matched.

What can be match funded?

UK Aid Match will match fund monetary donations from UK* based:

- **Individuals:** Where possible the organisation should check that individual donors live in - or have their primary residence in - the UK. There is no size limit on donations, but UK Aid Match will not match funds beyond the level agreed. For each donation over £5,000 UK Aid Match will request evidence of eligibility, such as the postcode of the donor. In line with data protection protocol, UK Aid Match will not keep this data on file after it has been validated
- **Communities:** UK Aid Match will match donations raised by community groups and events, for example cake sales, concerts, school fetes, including employee fundraising where the donation is not made on behalf of a private sector organisation. Payments can be made via the group or organisation providing all funds were given by individuals
- **Trust funds:** UK Aid Match will match donations from trust funds where everyone who owns the funds agrees to the donation being made during the appeal period. UK Aid Match requires proof of this in the form of a statement signed by the financial director or equivalent specifying

each donation and confirming that the donations have been made by individuals who own the funds, that the individuals have agreed to the donation being made to a specified appeal, and that the individuals understand that their donation will be match funded. The statement should be included in the Certified Statement of Income (CSI) which the partner organisation is required to submit to UK Aid Match.

- **Philanthropic organisations e.g. rotary clubs:** The organisation must be not-for-profit. The money must be raised for the specific appeal in question, and all individual donors must be aware both of the appeal purpose and of government match funding when they donate. Donations from foundations where funds are administered on behalf of the owners of the funds are not eligible for match funding.

*For UK Aid Match, the UK includes the Crown Dependencies - Jersey, Guernsey and the Isle of Man.

UK Aid Match will match fund the value of **'in kind' (i.e. non-monetary)** donations made to:

- **Individual or community events:** The donation must be made, and the event held, within the appeal dates
- **Charity shops:** Appeals for stock to be sold in charity shops can only be included as one part of a broader communications and fundraising plan for the appeal, i.e. charity shops must not be the only communications partner for the appeal as this would give an unfair advantage to larger charities that have a retail arm and high street presence. The stock appeal should focus on a category of stock e.g. jumpers, books or crockery. This helps to ensure that more donors are aware of the appeal and not simply 'incidental'. Charity shops must both receive and sell each donated item during the appeal period for the money that the item raises to be eligible for match funding. A robust system to evidence this must be in place. All possible channels should be used to ensure that appeal and match funding messaging is clear to people who are donating their goods to the charity shop and shop staff should be briefed to promote the scheme. Every effort must be made to ensure that the stock appeal is visible to passers-by and other potential donors, before they donate
- **Direct debits/payroll giving** We will match donations from new regular donors who qualify:
 - If they have not given to your CSO on a regular basis before
 - If they agree to give a regular amount through direct debit or payroll giving
 - If they sign up during the appeal period (we will match the first three months of donations, regardless of when they sign up during the appeal period)
- **Events:** Our guidance is consistent with HMRC rules on Gift Aid:
 - We will not match proceeds from compulsory ticket sales
 - We will match donations given to 'donation only' events where people can decide how much they can give (including making no donation at all)
 - We will match any voluntary donations made during events if guests are informed about the appeal and how match funding will be spent. This includes (but is not limited to) additional donations on top of the ticket price and proceeds from auctions/raffles. Donations can be matched from auctions, only if it is part of an existing event; for example a gala dinner. Donations will not be matched from online auctions or auction-only events for specific items
- **Legacies:** We will match legacies if the person making the legacy donation was informed about the match funding offer, expressed the desire to donate to the specific appeal in their will, and the donation can be made within the appeal's grace period (two months after the appeal finishes)
- **Restricted donations:** Donations restricted to specific projects/countries/issues are eligible for matching, provided those projects/countries/issues are consistent with the activities which the appeal is raising money for. For example, if the appeal is for improving maternal

health in Asia, and countries which the partner will use the funds in include Bangladesh, a donation restricted for work to improve maternal health in Bangladesh would be eligible for matching. However, the donor must be made aware that the match funding will not be restricted in the same way but will rather be spent on the UK Aid Match project which has been agreed with UK Aid Match, and be given details of this project

UK Aid Match will not match:

- Financial donations from for-profit organisations
- The Gift Aid element of donations
- The proceeds of selling in-kind donations made directly to the organisation (e.g. shares, goods to sell on eBay) unless this is part of a pre-agreed stock appeal
- It is the responsibility of the organisation to make sure these exclusions are clear
- We will not match donations from **existing regular donors** as this represents income that is already guaranteed to the organisation rather than given in response to your appeal. The exception is if an existing donor decides to increase their donation in response to seeing appeal materials. In this case, we will match the additional amount during the appeal period. For example, if someone decides at the start of your appeal to increase their monthly donation from £10 to £30, we will match the difference (£20 x 3 months = £60)

Wider appeals

UK Aid Match will not match an appeal where the overall fundraising target is more than twice the amount applied for matching by the UK government. For instance, if your appeal is likely to raise £6m and you apply for £2m from UK Aid Match. This is to ensure that the public are not donating to an appeal where all communications state that their donation will be doubled when, in fact, less than half of the eligible donations will be doubled.

Therefore, CSOs need to focus the UK Aid Match messaging and donations on a specific area of a wider campaign that will raise no more than twice the amount that can be matched. The specific area could be created through the type of fundraising method, activity, channel, location or time period.

You will also need to include a message that donations 'up to £x' will be matched by the UK government. All the usual requirements of UK Aid Match still apply, such as the need for communications partners reaching an OTVs minimum of 400,000.

For example: A CSO is holding a wider appeal to raise £10m and only £2m can be matched by the UK government. This is not a high enough percentage of the wider target to be adequately transparent to their donors. Therefore, the CSO identified that their schools fundraising activity has a target of £3m and focused their UK Aid Match activity and messaging around this. They included messaging that 'up to £2m' of donations from schools will be doubled by the UK government and created communications partnerships with schools, First News and regional newspapers where the schools are located.

4. Communications partnerships

A communications partnership is a partnership between the UK-based CSO that will receive and manage the match funding and one or more organisations (communication partners) that will help publicise the appeal to the public, free of charge to the CSO. The communications partner or partners must provide existing communication channels that are guaranteed to provide a defined or reasonably estimated number of OTVs –with an explanation for how figures have been calculated.

A communications partner in the context of UK Aid Match is an organisation that:

- Is separate to the not-for-profit organisation delivering the project (and therefore has its own, established audience beyond the applicant's existing supporter base)
- Gives its support free of charge
- Provides its own, existing channels

A communications partner is not an organisation that:

- Provides services for a fee such as paid-for advertising. And though well thought-through, paid-for advertising may contribute valuable opportunities to view your appeal, it is unlikely to offer appropriate or justifiable post-appeal communications opportunities
- Buys channels on the organisation's behalf
- Provides communications-related services (e.g. graphic and digital design, marketing and PR, media buying etc). Though organisations are encouraged to seek other pro bono services such as these to contribute to their appeal, they are not considered communications partners unless they also provide channels to reach the public

Strong communications partnerships must:

- Provide channels that are, in principle, open access and publicly available, not exclusively channels that are limited to only a particular set of recipients (e.g. customers, subscribers from a database). Websites can be considered as channels if the relevant pages attract a high volume of general traffic or are accompanied by planned activity that will drive audiences to this content
- Include a commitment from the communications partner to play an active role in explaining the development goals and outcomes of the appeal to their audiences. The most convincing UK Aid Match partnerships are those in which the communications partners genuinely get behind the cause. This allows them to promote it as an issue they themselves support, resulting in more authentic content
- Use a suitable and creative range of channels and content to engage the appeal audience with quality content
- Communications partners do not need to have a national reach. A clearly thought-out focus on a highly defined audience or region can be a very successful approach. For instance, by focusing on a specific business audience or area of the country with appropriate communications partners.

Frequently used communication partners

Please note that applications frequently include the same communications partners year on year. In fact, there is a small list of communications partners who are included in a very high number of applications each year. Given that we aim to reach diversified audiences through this initiative (see audiences section below) a wide range of partners is very welcome. It is also in your interest to consider potential clashes with other CSOs and your partners.

Other partners

You may want to engage other partners in your appeal, such as sponsors or corporate partners. Please note that these will need to be approved as part of your application. If a further partner is engaged at a later date they may still be considered, and approval must be sought.

5. Opportunities to view

OTVs – communications partners

For an opportunity to view to be counted as one of the minimum 400,000 required, it must reach a UK audience and include the UK Aid Match message and logo where appropriate.

The minimum 400,000 unique OTVs must be reached through your pro bono communications partners. To reach the 400,000, the OTV of every channel that each partner has committed to in writing can be added once. You cannot calculate every article or every post on each channel. Additional OTVs can be achieved through other communications activities such as earned PR, paid activity or through your own channels.

We recognise there are many ways of estimating opportunities to view. Where possible, you should use figures from an established, recognised audience measuring body for that channel or industry. You should calculate your OTVs realistically and use your communications plan documents to explain your calculations.

It would not be meaningful to provide an OTV figure of the footfall of an entire department store, if there is only one product or stand in the store that carries your appeal message. Similarly, it would not be appropriate to include the number of unique monthly users for a website if your content is only on the home page for two days.

Please note that, when calculating the OTVs in your application, you can only include the channels and partners that have been committed to in writing.

Examples of how an organisation might achieve at least 400,000 opportunities to view through a single or combination of partners:

- A partnership with a national newspaper with a readership of >400,000
- A partnership with a faith community or schools with over 400,000 in regular worshippers or pupils whose parents will be reached
- A local festival with a footfall of 20,000 + regional paper with 250,000 readers + local business with a footfall of 5,000 and website of 10,000 + regional magazine with 150,000 readers
- A partnership with a retailer (e.g. supermarket) or service provider (e.g. restaurant) with footfall and/or customer base of >400,000 that has agreed to display or promote your appeal in a way that will realistically be seen
- A combination of partners that have agreed (guaranteed) to provide coverage which collectively provide >400,000 OTV

Examples of acceptable means of calculating OTV for UK Aid Match

Please note that if your communications partners have a global reach you need to find out or make a reasonable estimate of the OTVs for a UK audience.

Channel	Opportunities to view
Partner mailing lists and intranet	Count the readership or distribution list once
Articles in magazines and newspapers / TV and radio broadcasts	Readers / viewer / listeners for the day/time of publication/broadcast. NB This is now per partner and not per article
Adverts in magazines and newspapers	Advertising reach (e.g. readership or other figure given by advertising vendor)
TV and radio adverts	Advertising reach (as above)

Events	Attendance (providing that the appeal messaging is likely to be viewed by all)
Retail	Average footfall (providing the appeal is very visible) for the period that the messaging is on display
Digital	<p>Note: Count Twitter followers, Facebook fans or other social media channel followers only once towards your OTVs (e.g. if your ambassador tweets 10 times during your campaign, OTVs for UK Aid Match does not = 10 x Twitter followers)</p> <p>After your appeal, you may use tools such as Tweet Reach to calculate total reach or impressions</p> <p>For websites, use average monthly page views wherever possible, or state in your activity plan what measurement you are using. You need to give a meaningful figure – if the location of your content is buried within a website, or only on display for a limited time, it is not reasonable to claim the full monthly OTVs for your content</p>

Do not overestimate your opportunities to view. Unsubstantiated figures could damage the credibility of your application.

Example to illustrate OTV calculation

A CSO has written commitments from communications partners: Guilty Feminist podcast, Stylist and Evening Standard. The letters contain information on the OTVs of each of these channels, as well as information on the frequency and nature of the content (news article, advert, feature, retweet etc).

Partner	OTV	Calculation	OTV for application
Guilty Feminist			
Podcast x1	30m downloads in total 111 episodes (Guilty Feminist)	30m divided by 111 = average download per podcast of 270,000	270,000
Twitter x3	407,000 followers		407,000
Stylist			
Print x2	400, 359 (Gorkana)		400,359
Online x2	1m unique monthly users (Gorkana)	1 day on the home page and on site for duration of appeal. 1m divided 30 =33,333 Generous guestimate for content for duration of appeal = 100,000	133,333
Facebook x2	634,000 likes		634,000
Evening Standard			
Print x1	873,398 (Gorkana)		873,398
Online x2	17,475,971 unique monthly users (Gorkana)	1 day on the home page and on site for duration of appeal. 17,475,971 divided by 30 = 582,532 Generous guestimate for content for duration of appeal 2m	2,582,532
Twitter x4	594,000 followers		594,000
TOTAL			5,894,622

Other opportunities to view

Additional OTVs should be explored through your own channels, earned PR or paid for activity. These other forms of communications may contribute to your **total** opportunities to view both for the appeal and communicating success, but only after the minimum 400,000 has been achieved through your pro-bono communications partners.

6. Audiences

UK Aid Match is designed to give a wide and diverse range of the UK public the opportunity to have a say on how some of the aid budget is spent, through appeals run by CSOs. Therefore, there are no specific target audiences for the scheme within the UK population.

We are looking to reach new audiences and we specifically mean new audiences to your CSO. This may be measured as new donors, but it is also new audiences reached through your communications partners.

CSOs that have taken part in previous UK Aid Match campaigns should consider how their latest appeal, and communications partners, will reach new audiences for them.

Your application should explain your choice of audiences, and what methods and messages you will use to reach them. You should explain why you think your proposed appeal activities will engage your chosen target audiences effectively. Insight, evidence and testing with your audiences is encouraged.

In keeping with our principle of giving a wide and diverse public a say, communications that are limited to individuals on a closed customer database will not count towards the eligibility threshold of 400,000 opportunities to view. For example, the employees of a company adopting the appeal for internal fundraising, and customers on a retailer's email distribution list. However, such channels can and should contribute to total OTVs once you have passed the eligibility threshold.

While direct communications to existing supporters will not count towards the eligibility threshold, they should be included in the appeal communications plan and must also adhere to UK Aid Match guidance as explained above.

7. Plan of delivery

Once you are clear on your objectives, audiences and messaging you need to develop a well thought through plan of activity that will maintain momentum throughout the duration of your appeal. This should include a range of activities to engage your donors and audiences, suitable to the objectives of your appeal.

Be clear what marketing and communications methods you will be using – PR, direct mail, events, social media etc. – and detail how you'll keep audiences engaged across these channels.

Make sure you include ways for supporters to engage their peers and become advocates for the appeal, for instance through social media, events, faith groups or schools.

Local and parliamentary engagement

Engaging with local communities and parliamentarians is an integral part of the CSO's communications. Consider how you can engage parliamentarians both locally and at Westminster. CSOs will be asked to work with us on the following activities:

- The Secretary of State will write letters to MPs at the end of individual appeals and at the end of each round of UK Aid Match. CSOs will need to provide data and stories to support these

- As part of communicating success after the appeal, CSOs will be given access to artwork for thank-you cards and certificates. CSOs will need to tailor these materials so they can print them off and present them to key fundraisers or use on social media
- CSOs should seek to organise a photo opportunity involving the CSO, fundraisers, and a local parliamentarian to celebrate the funds raised. We can provide artwork including certificates and also props for photo opportunities
- Leveraging the CSO's media partnerships, social media channels and other relationships
- The CSO should also make full use of their media partnerships and their own channels (e.g. websites, newsletters, emails, charity shops, high profile supporters etc.) to generate public awareness of their local and parliamentary engagement activities, and the support of UK Aid Match

Website

CSOs will include a section on their appeal website/microsite to provide fuller details of how they will use match funding. This ensures we are being transparent with the public about how UK aid will be spent.

Press release

CSOs will commit to at least one press release to launch their appeal and one press release to announce their appeal total; additional regional and specialist press releases are also strongly encouraged. The press release must include a quote from the Secretary of State and Notes to Editors about UK Aid Match. Further details on this process will be shared with successful applicants.

Resource

You will need to think about the resource available to deliver your plan of activity. Ensure it is achievable and consider the team and colleagues who will need to be part of the activity. Charities running large appeals can benefit from having a full-time project manager to help coordinate the appeal. Charities might need support from PR and creative agencies to make their messaging stand out.

8. Messaging and branding

Appeal messaging

Appeal messages should clearly and accurately communicate how public donations and match funding are expected to improve the lives of poor people, in a creative and engaging way. Messages and images should emphasise how development interventions aim to increase the empowerment and self-sufficiency of target communities while telling strong, human stories and giving individuals a platform to tell their own story.

We also recommend referring to the [Narrative Project](#) when developing your messages, whilst bearing in mind that the Narrative Project is designed as a long term, whole-organisation approach to changing the public conversation on international development, and not specifically for fundraising.

Examples of things to consider in building messages include avoiding:

- Sweeping statements
- Making people feel guilty or blamed
- Avoiding words such as 'could' or 'might', that can provoke doubt

Appeal visuals

Images and film can help bring your appeal to life. We expect your appeal imagery to show the type of work that your organisation will do with UK Aid Match funds, **not** its broader work.

Choose images or film that show beneficiaries as active, not passive, and portray people as individuals that the viewer can relate to. We want to avoid objectifying or 'othering' people in developing countries. It is unacceptable to use images that evoke mere pity and helplessness and that lack dignity.

Caption the image or film so that the individual(s) and/or location featured is named and it is clear what you want to say with the image or film. If you are communicating the UK Aid Match logo in the image or film, then ensure that the logo is included in the original shot, rather than pasted on top of the image.

Examples of the type of images we are looking for are as follows:



Messaging match funding and your project

We expect charities to adhere to relevant legislation and guidance on fundraising, including the sector's self-regulatory [Code of Fundraising Practice](#)

You must ensure that you use the match funding message in a way that does not risk misleading the public as to how their donations and match funding will be spent. The emphasis should be on how it is the public's or individual's act of donating that allows match funding to take place and more people to benefit.

The appeal will ideally have a theme that features the project, issue, sector and/or country that UK Aid Match funds will be used for as all or part of its theme. We have found from experience that this type of appeal has the most simple, compelling messaging and can make best use of the 'doubling' message. Importantly, it also means that UK aid will go towards projects that have motivated public donations.

If the appeal is for core funding, you must ensure that the theme and messages are consistent with the match funding agreement.

We expect your appeal communications to focus on the type of work that your organisation will do with UK Aid Match funds, as opposed to your organisation's broader work. Your website and appeal materials should make clear as to how UK Aid Match funds will be spent. This ensures we are being transparent with the public about how UK aid will be spent.

An example of an acceptable appeal/project combination

The appeal will raise money to improve beneficiary health. DFID money will go towards maternal health training programmes. The appeal focuses on other health interventions that are more easily understood by the public (e.g. malaria, vaccination, clean water). This is acceptable providing that:

- i) There are several communication activities that explain how match funding money will be spent, and a permanent record of this on the website*
- ii) Donations will be spent on malaria prevention among other things*

The messaging does not imply that the match funding will go towards more vaccines, more clean water etc.

Case studies

Beneficiary stories, pictures, and voices (written, audio, video) offer a powerful means of engaging the public and convincing them of the value of development. It is the applicant's responsibility to ensure that they have obtained the appropriate consent to use any images, audio, video and quotes.

9. Mandatory UK Aid Match messaging

Branding

Branding refers to both the UK Aid Match logo and the written phrases listed under the 'Describing UK Aid Match' section below. All appeal materials must carry both the logo and one of the written phrases to qualify for match funding – if they do not, DFID reserves the right to refuse to match any donations that are generated by that element of your appeal.

Mandatory messaging

DFID would like all UK Aid Match appeals to communicate clearly to the public about UK Aid Match and how match funding will be spent. These are mandatory requirements:

Describing UK Aid Match

CSOs will use **one** of the following **descriptions across their appeal materials**:

- **Option 1:** "From DATE to DATE, all public donations to NAME OF APPEAL will be doubled by the UK government." (After appeal has launched) "Give before DATE and all public donations to NAME OF APPEAL will be doubled by the UK government."
- **Option 2:** "From DATE to DATE, the UK government will match all public donations to NAME OF APPEAL." (After appeal has launched) "Give before DATE and the UK government will match all public donations to NAME OF APPEAL."
- **Option 3:** "From DATE to DATE, your donation will be doubled by the UK government. We will be able to support even more XXX [insert detail e.g. children to get a decent education, communities to grow sustainable crops etc] (After appeal has launched) "Give before DATE and your donation will be doubled by the UK government. We will be able to support even more XXX [insert detail e.g. children to get a decent education, communities to grow sustainable crops etc.]

Any variations must be agreed with UK Aid Match before use.

Describing how match funding will be used

CSOs will use **one** of the following descriptions in their appeal materials:

- **Option 1:** "Donations to NAME OF APPEAL will be used to XXX [insert detail e.g. support children to get a decent education, support communities to grow sustainable crops etc.]
- **Option 2:** "Match funding from the UK government will be used to XXX [insert detail e.g. support children to get a decent education, support communities to grow sustainable crops etc.]

Any variations must be agreed with UK Aid Match before use.

Unacceptable ways to describe UK Aid Match and match funding

- Phrases that do not recognise the UK government's role e.g. 'We will double your donation'

- Phrases that make UK Aid Match sound like an organisation e.g. ‘NAME OF APPEAL is supported by UK Aid Match’
- Phrases that imply all donations are going to one project/issue if funding is going to be split between a number of projects/issues

Using the UK Aid Match logo and messaging

The UK Aid Match logo should be easy to read and a decent size. The logo should be used in full colour wherever possible. The logo should not be altered in any way (e.g. do not change the colours or stretch it) and should not be incorporated into another logo.

Any exceptions should be agreed with UK Aid Match in advance. For example, it can be difficult to include both the logo and written phrase on small digital adverts. UK Aid Match will work with CSOs to find a sensible compromise.

When working with other partner logos, other than your logo and the UK Aid Match logo, UK Aid Match will need to approve a logo lock up of all the logos as part of the initial messaging approval stage. This must be the only use of other logos in any UK Aid Match content and materials. UK Aid Match expects the size and hierarchy of the logos in the lock up to reflect the scale of financial commitment from all partners. Please also note that any other partners or sponsors must be approved by UK Aid Match.

- **For UK Aid Match:** This is a slight variation of the standard UK aid logo. UK Aid Match partners must use this version in their UK facing communications both during their appeal and when reporting back to the public on who has been helped.
- **UK Aid Match partners:** UK Aid Match partners should aim to use the logo in all appeals communications with the UK Aid Match message. We recognise there are occasions (particularly with PR activity) on which the partner may not have editorial control. A non-exhaustive list of places we would expect to see the logo includes: on the organisation’s homepage, donation page, owned channels and on all partner communications and collateral relating to the appeal, including websites, posters, billboards, TV, videos, etc.

The [general UK aid branding guidance](#) for partners also applies to this logo. This includes:

- Using the colour logo on a white background where possible
- Not distorting, changing the colour of or rotating the logo
- Observing the exclusion zone (width of the 'U' in UK), a minimum logo width of 17mm
- Not incorporating the logo into any larger logos

This version of the logo is ONLY for use in your communications to a UK audience that relate to your appeal and where appropriate, communicating success after the appeal under the UK Aid Match scheme, and should not be used on any materials that are not part of the appeal. The original logo should be used for visibility of your project in country under your accountable grant agreement.

While you may have a specific logo for your appeal, it is not permissible to include any part of the UK Aid Match logo or the words ‘UK government’ in any new logo.

Your appeal copy must include a clear message about government match funding as an integral part of the appeal. It should not be treated as small print or an afterthought. Whenever an individual is prompted to donate they should understand that their donation will be doubled by the government.

A non-exhaustive list of where UK Aid Match messages should be included: on screen during TV appeals; videos; telephone scripts; staff and high-profile supporter briefings for use in interview; press notices; text messages; emails; social media posts etc.

You must also ensure that your messaging meets any fundraising guidelines and that any claims about what money will achieve are accurate.

Digital

The logo and other references to the UK government in online communications should be linked, where possible to a DFID online presence e.g. [Facebook](#) (opens in a new window), www.gov.uk/DFID (opens in a new window); – discuss which is most appropriate with UK Aid Match. Use #UKAidMatch, #UKaid and #UKgov hashtags and the Twitter handle @DFID_UK when referring to your UK Aid Match appeal. Additional hashtags may be agreed.

Social media is more effective when strong images or meaningful infographics or pictograms/quotagrams are used, and you should seek to incorporate the UK Aid Match logo (and messaging) in these images (which can save copy on Twitter and other short form social media platforms). We will be looking for content that is shareable.

Facebook prioritises video content and short, interesting videos can be very successful engagement tools (UK Aid Match logo must be incorporated in video throughout/at the beginning. Including the logo on an end board is not adequate.)

We also encourage innovative ways of using social media to actively engage your audiences.

10. Communicating success post appeal

After your appeal has finished, we expect CSOs to communicate success to the public on at least two occasions after the statement of income has been verified.

1. Ideally within three months

A brief communication of success to confirm the total amount raised, the UK government's match funding, and to thank donors for their fundraising efforts. This will include (but is not limited to):

- Activity with your appeal partners and through your own channels
- A press release that can be tailored for your CSO including a quote from the Secretary of State
- Opportunities for ministerial involvement
- Artwork for props that can be used for photo opportunities
- Thank-you cards that can be tailored for use on social media or offline
- Thank-you certificates that your CSO can issue to groups and outstanding fundraisers
- A joint letter between DFID's Secretary of State and your CSO to send to local MPs
- Materials will be made available to successful CSOs and further briefing will be given on the joint letter

2. Ideally within 12 months

A communication once the project starts to show the public how UK aid is being spent and what it achieves. This must take place in the first year. It could include (but is not limited to):

- Activity with your appeal partners and through your own channels
- Written/audio/visual reports e.g. a magazine feature, radio documentary or photo essay
- Social media content that shows your project in action e.g. messages from beneficiaries or video footage of your project in action

- Sharing good story opportunities with UK Aid Match (e.g. outstanding results or on agreed themes)
- Visits by CSO supporters/ambassadors

We encourage CSOs to exploit further opportunities to communicate the project's success after 12 months, and any activity will form part of your ongoing reporting for your project.

The timings for these report backs are for guidance only. If a better opportunity comes up (e.g. a relevant international awareness day takes place outside of that time-frame), we are open to moving those dates.

11. Concurrent public facing activity

If your organisation is running another appeal at the same time as your UK Aid Match funded appeal, they must be kept distinct: you cannot apply the UK Aid Match funding offer to the other appeal and must ensure that donors to other funds are not given the impression that their donations might also be matched.

Ideally, your UK Aid Match appeal should be the main or only public facing activity that your organisation is running for that period; exceptions will be considered on a case-by-case basis.

12. Appeal timings

Publicity before the appeal period

Organisations may not start to publicise the match funding of their appeal or solicit donations before it starts. However, it is acceptable to distribute information about the appeal to specific fundraising or volunteer networks, so they can prepare for the appeal launch.

Those who do receive advance communications must be made aware that fundraising and donating (including sponsorship) can only take place during the appeal period, and there must be no call to donate before the appeal period starts. Organisations may also recruit potential challenge participants (e.g. for challenges such as runs, climbs etc) or volunteers for fundraising events including sponsored activities that fall within the appeal period, letting them know that funds raised because of the activity they will be participating in will be match funded. Recruits must understand that fundraising must not take place prior to the appeal starting.

Preparation of appeal communications

Work can start on preparing appeal communications from confirmation of a successful application and while due diligence is underway, although nothing can go live until due diligence is complete and all activity and materials approved. From confirmation of successful application:

- **Messaging approval:** Key messages for the appeal, including references to the government doubling the money raised, must be approved by UK Aid Match. A minimum approval turnaround of five full working days is required
- **Final activity timetable agreed:** The activity timetable (Form C2) is updated with any changes to activity or timing and shared with UK Aid Match. This includes any changes and final confirmation of the communication partner(s), as well as opportunities for ministerial involvement in communications activity
- **Materials approved:** Once the key messages document has been approved the materials needed to deliver the appeal, as outlined in the final activity timetable, must be approved by UK Aid Match. We need at least five full working days for turnaround and longer for more

complex, controversial or high volume of materials. Please stagger volume of materials for approval and provide notice

Appeal start date

Appeals will usually start between six weeks and six months after match funding has been confirmed, any issues resolved and subject to due diligence requirements.

You have a responsibility to ensure that none of the opportunities to communicate the UK Aid Match offer promised in your communications plan are missed. Any changes or revisions, including additions, should be drawn to UK Aid Match's attention at the earliest opportunity.

Appeals end – first communication of success to the public

Ideally within three months of the appeal end, and only once UK Aid Match has confirmed the total amount raised, CSOs must communicate the success of their appeal. Refer back to [section ten](#) for more details.

Within three months of appeal completion – project begins

Projects should usually start within three to six months of the appeal ending. Where there are good reasons to delay, flexibility can be offered on start date.

Three to six months later – communicate project success to the UK public

Ideally within 12 months, CSOs must report back to the public to show how UK aid is being spent and what it achieves. Refer back to [section ten](#) for more details.

13. Approvals

If successful in your application, you must ensure that UK Aid Match gives approval at every stage of your appeal development. UK Aid Match must approve your key messages document before any other materials can be approved. Each piece of material must also be approved, including UK Aid Match messaging and logo in each context.

Absolutely no content or information about your appeal or UK Aid Match activity can be released without UK Aid Match prior approval.

14. Reporting and evaluation

Evaluating your appeal

UK Aid Match is committed to improving the performance of UK Aid Match communications, both for individual appeals and for the programme. All reports will be shared with DFID management. CSOs will be expected to support evaluation:

- When your appeal is live, you will be asked to provide a short performance summary of your appeal and key metrics once a month, and to provide inspirational stories about your fundraisers for DFID to feature in its communications
- At the end of your appeal, you will be asked to evaluate the performance of your appeal including fuller metrics and feedback/learnings and to provide post code data for your donors. This data will be used to identify regional support for UK Aid Match; individual donors will not be identified

- Also, at the end of your appeal, you will be asked to provide two 300-word stories about your supporters' outstanding fundraising activities, with accompanying photos/video
- For the life of the grant you will be asked to provide quarterly reports on reputational risk, and on any communications activity for the quarter
- Also, for the life of the grant you will be asked to provide an annual report on reputational risk and any communications activity for the year

We will provide successful CSOs with templates and further briefing. It is important that CSOs return these templates by the given deadline as all results are collated and shared with the Secretary of State and DFID management.

15. Learning points

The points below have been shared by other charities which have previously run UK Aid Match appeals. Not all points will be practicable – especially for smaller organisations – but you may find them helpful:

- Charities running large appeals can benefit from having a full-time project manager to help coordinate the appeal
- Charities might need support from PR and creative agencies to make their messaging stand out
- Use of the UK Aid Match logo is key to getting public support – make it as prominent as possible
- Major donors were a significant source of income and often motivated to give more by the UK Aid Match offer
- Support from media partners can change or be withdrawn, and charities need to be creative to fill gaps

16. Summary of the key stages of the appeal communication application

Please ensure you read the more detailed information in the full project guidance carefully before you start your application.

STAGE	TASK	TIMELINE
Concept note	Complete and submit the following via www.ukaidmatch.org by the deadline. <ol style="list-style-type: none"> 1. Letter/email of support from each of your appeal communications partner(s) (see section 4 on Communications Partners) 2. A1 appeal communications form 3. A2 appeal communications spreadsheet 	Deadline for concept note applications 13 December 2018
Applications are assessed and scored. Await decision and feedback. If approval is granted, please proceed full proposal stage.		First week of February 2019.
Full proposal	UK Aid Match will run a workshop to guide applicants through the process and provide an opportunity to ask any questions. Complete and submit the following individual and clearly labelled documents via www.ukaidmatch.org by the deadline. <ol style="list-style-type: none"> 1. C1 Appeal communications form 	Mid - February 2019

	<p>2. C2 Appeal communications spreadsheet</p> <p>3. Written confirmation of appeal communications partnership(s)</p>	
Applications are assessed and scored. Ministerial decision is taken on which UK Aid Match appeals will go ahead. CSOs will be notified if they have been successful or not.		Mid July 2019.
Successful CSOs must go through due diligence before their appeal can go live. CSOs are notified of the outcome of due diligence.		July, Aug, Sep 2019.
Preparation of appeal communications	Work can start on preparing appeal communications from confirmation of a successful application and while due diligence is underway.	From confirmation of successful application
Messaging approval	Key messages for the appeal, including references to the government doubling the money raised, are approved by UK Aid Match.	From confirmation of successful application until five weeks ahead of appeal
Final activity timetable agreed	The activity timetable (Form C2) is updated with any changes to activity or timing and shared with UK Aid Match. This includes any changes and final confirmation of the communication partner(s), as well as opportunities for ministerial involvement in communications activity.	From confirmation of successful application until five weeks ahead of appeal
Materials approved	Once the key messages document has been approved the materials needed to deliver the appeal, as outlined in the final activity timetable, must be shared with UK Aid Match for approval.	From confirmation of successful application until three days before material published
Appeals begin	Appeals can start between six weeks and six months after match funding has been confirmed, subject to due diligence requirements.	Six weeks to six months later
Appeals end – first communication of success to the public	Once UK Aid Match has confirmed the total amount raised, CSOs must communicate success at end of the appeal to the public to confirm the total amount raised, the UK government’s match funding, and to thank donors for their fundraising efforts.	Usually within three months of appeal completion