

## UK Aid Match II Round 4

### Communications and appeal application rule book

How to design a successful and eligible UK Aid Match appeal.

Please click on the titles below to navigate to the relevant sections.

<b>1. Overview</b>	3
Funding the appeal	3
Helpful resources	4
Glossary of terms and instructions for use	4
Key stages of the appeal from application to appeal end	6
<b>2. Assessment stages and criteria</b>	7
Concept note stage	7
Communications partnerships	7
Communications partners' letters of commitment	8
Fundraising plan	8
Appeal messaging	8
Capacity	8
Additional OTVs	8
Evaluation	9
Concurrent activity	9
Full proposal stage	9
<b>3. Fundraising</b>	12
Donations	12
Grace period following appeal end	12
What can be match funded?	13
UK Aid Match will not match	15
Larger appeals	15
<b>4. Communications partnerships</b>	15
Other partners	17
<b>5. Opportunities to view</b>	17
Examples of acceptable means of calculating OTV for UK Aid Match	18
How to calculate OTV (example)	19
Other opportunities to view	19
<b>6. Audiences</b>	19
<b>7. Plan of delivery</b>	20
Local and parliamentary engagement	20

Website	21
Press release	21
Resourcing, project management and lead-in time	21
Approvals	21
<b>8. Messaging and branding</b>	<b>22</b>
Why is comms assessed alongside the project?	22
Narrative Project	22
Messaging	22
Appeal visuals	23
Case studies	24
<b>9. Mandatory UK Aid Match messaging</b>	<b>24</b>
Describing UK Aid Match: the UK Aid Match mention	24
Describing how match funding will be used	25
Unacceptable ways to describe UK Aid Match and match funding	25
Using the UK Aid Match logo and messaging	26
Digital	27
<b>10. Concurrent public facing activity</b>	<b>27</b>
<b>11. Communicating success post appeal</b>	<b>27</b>
<b>12. Reporting and evaluation</b>	<b>28</b>

## 1. Overview

To be considered eligible for UK Aid Match CSOs must:

- Be registered with the Fundraising Regulator. The exception to this rule is CSOs registered in Scotland
- Seek to raise at least £100,000 within a three-month appeal period. Donations must be from UK-based individuals, communities, trust funds and philanthropic organisations (donations from businesses are not eligible for matching)
- Raise funds that are going towards an eligible international development project or support the CSOs wider activities
- Use a pro bono communications partnership (see section four on [communications partnerships](#)) with one or more organisations (communications partners) that can confidently provide at least 400,000 unique opportunities to view (OTVs) through a variety of channels. This number should not include the applicant organisation's existing supporter database (e.g. through direct mail or Twitter followers).

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
- Lobby 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.

Other requirements:

- Include the UK Aid Match messaging and logo clearly in all appeal communications. This message is that all public donations will be doubled/matched by the UK government
- Clearly communicate what donations and the match funding from the appeal will achieve
- Identify at least one opportunity for ministerial involvement e.g. attending an event, taking part in a challenge or social media activity celebrating the appeal with the charity and its key fundraisers. More than one welcome
- Include plans for the organisation and communications partner(s) to communicate to the public when the project is underway, using images, quotes, stories, case studies etc. This will show where money has gone, and how it has improved lives
- Wherever appropriate, include links to Department for International Development's (DFID's) online presence. Including: [Twitter @DFID\\_UK](#), Instagram @DFID\_UK, [Facebook @ukdfid](#) and the gov.uk website.

## Funding the appeal

Please note that match funding from the UK government must be used for the activities set out in your project proposal. Match funding must not be used for any expenses relating to running the appeal, fundraising, promotion or communications reporting on success. Public donations made to the appeal can be used more flexibly across your organisation's work. A minimum 10% contribution from either the appeal or other sources will be expected to make up the budget. Where match funding and public donations are planned to be spent on the project, the division must be clearly communicated at all times.

## Helpful resources

- The Code of Fundraising Practice: <https://www.fundraisingregulator.org.uk/code>
- Information about registering with the Fundraising Regulator: <https://www.fundraisingregulator.org.uk/registration/registering-fundraising-regulator/>
- Information about the Scottish Fundraising Standards Panel: <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: <https://www.gov.uk/topic/running-charity/fundraising>
- Information about the Information Commissioner's Office and charities: <https://ico.org.uk/for-organisations/charity>.

## Glossary of terms and instructions for use

Opportunities to view (OTV)	The number of people that had the opportunity to view your content. (See the <a href="#">'how to calculate OTV'</a> section).
Out of home (OOH)	Outdoor advertising such as bus stops, train stations and road sides.
Earned OTV	Earned OTV or PR-led OTV, is where the OTV was generated by persuading a third party to publish your content. For example, a media outlet printing an article or celebrity tweeting your content.
Paid for OTV	OTV generated through paid for activity. This could be anything from bus stop posters to sponsored Facebook posts.
Owned OTV	This is OTV generated on any channel that you own, such as your organisation's Facebook, LinkedIn or Twitter account. It could also include your website or your own mailing database.
Fundraisers	By fundraisers we mean those who have fundraised on your behalf, rather than simply donated. For example, through organising a fundraising event or being sponsored to do something challenging.
Pro bono communication partners	These are your partners who agreed to support your appeal free of charge as part of a partnership. It differs from other third-party support as it is part of a formal written agreement.

Volunteers	Anyone who volunteered for your appeal, excluding fundraisers (see above).
Value in kind	For the purposes of your end of appeal evaluation this refers to any support given to you for free. This can be from supporters, communications partners, networks etc. (See instructions on calculating value in kind on UK Aid Match website).
Eligible donation	Eligible donations are those which meet the criteria detailed throughout this UK Aid Match communications and appeals rule book. These donations must be given in response to an eligible appeal which follows the rules stated above and below, and be from an eligible donor.
Region	Where information is required on the region, this refers to the region where the majority of the audience were based, rather than where you are based. There may be more than one specific area, in which case please use as many lines of the spreadsheet as you need to list them. If your activity is spread across most of a nation or the UK please just choose that option, rather than listing out every region.
UK Aid Match mention	Messaging doesn't always have to say 'UK Aid Match' but it must be clear that the UK government is matching or doubling the public donation. This can be with copy or the logo.
Measurement tools used or assumptions	Please detail what your OTV figures are based on. For instance, this could be provided by the organisation, a media database such as Gorkana or provided by advertising rate cards. If you have made a calculation for a website using a monthly user value and dividing it by the number of days on the homepage, for instance, please set out the methodology in that cell.
Channel	Sometimes it might be difficult to decide which channel to select from the drop down options in the spreadsheet – for instance, if you have inserts in a goodie pack at an event. In this case please use your judgement to choose the predominant channel. In this example please choose 'event' not 'insert' – as the key method of reaching the audience is an event.
Categorising media coverage	The categories for media outlet types for PR coverage are: radio, TV, consumer magazine, consumer online, trade media, newspaper print, newspaper online. Radio would be any type of editorial content on a radio outlet – online or analogue. If you gain coverage in a consumer print magazine and online please create two lines and specify both. This also applies for newspaper coverage and trade coverage. Online outlets such as BuzzFeed, Huffington Post, Mumsnet or The Poke would all be considered 'consumer online'.
Media monitoring	We recognise that not all CSOs can use paid for media monitoring services. In this case, we recommend that you use Google alerts to monitor online coverage, source coverage that you know has appeared through your partnerships or other intelligence and scan the media outlets you can access.
Social media monitoring	We recognise that not all CSOs can use paid-for media monitoring services. Please calculate OTV of posts using number of followers on the account. You can also count likes, comments and shares yourself. There are also some free social media tools available such as Hootsuite and TweetDeck.

## Key stages of the appeal from application to appeal end

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

STAGE	TASK
Concept note	<p>Complete and submit the following via <a href="http://www.ukaidmatch.org">www.ukaidmatch.org</a> by the deadline.</p> <ol style="list-style-type: none"> <li>1. Letter/email of support from each of your appeal communications partner(s) (see section 4 on Communications Partners)</li> <li>2. A1 appeal communications form</li> <li>3. A2 appeal communications spreadsheet.</li> </ol>
Applications are assessed and scored. Await decision and feedback. If approval is granted, please proceed full proposal stage.	
Full proposal	<p>MannionDaniels and The Social Change Agency will run a workshop to guide applicants through the process and provide an opportunity to ask any questions.</p> <p>Complete and submit the following individual and clearly labelled documents via <a href="http://www.ukaidmatch.org">www.ukaidmatch.org</a> by the deadline.</p> <ol style="list-style-type: none"> <li>1. C1 Appeal communications form</li> <li>2. C2 Appeal communications spreadsheet</li> <li>3. Written confirmation of appeal communications partnership(s).</li> </ol>

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.	
Successful CSOs must go through due diligence before their appeal can go live. CSOs are notified of the outcome of due diligence.	
Preparation of appeal communications	<p>Work can start on preparing appeal communications from confirmation of a successful application, while due diligence is underway. At this stage, CSOs should be in contact with their Social Change Agency lead.</p> <p>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.</p> <p>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. Recruits must understand that fundraising must not take place prior to the appeal starting.</p>

Messaging approval	Key messages for the appeal, including references to the doubling, are approved by The Social Change Agency.
Final activity timetable and story hooks document approved.	The activity timetable (C2 Form) is updated with any changes to activity or timing and shared with The Social Change Agency. 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 initial materials needed to deliver the appeal must be shared with The Social Change Agency for approval.
Appeals begin	<p>Appeals will usually start between six weeks to six months after match funding has been confirmed subject to due diligence requirements.</p> <p>You have a responsibility to ensure that activities promised in your communications plan are carried out.</p> <p>Any changes or revisions, including additions, should be drawn to The Social Change Agency's attention at the earliest opportunity.</p>
Appeals end – first communication of success to the public	Once it has been verified by MannionDaniels, CSOs must communicate the total raised by their appeal to the public. Ideally within three months of the appeal end. Refer back to <a href="#">section ten</a> for more details.

## 2. Assessment stages and criteria

This section summarizes the key areas assessed in a UK Aid Match two-stage application.

**You will need to read all the details in this document carefully to complete a successful application.**

### Concept note stage

Your appeal must be three months in length and focus on DFID eligible countries. At this stage, you will need to fill in the A1 and A2 forms. Your appeal communications will be assessed for:

- **Communications partnerships**
  - **Audience reach:** Your pro bono communications partnerships should provide a proportionate OTV to fundraising total (with a minimum 400,000 OTV)
  - **Compliant messaging:** Communication partners should agree to include UK Aid Match message and logo in all appeal communications so that the public are aware of the match funding whenever they are prompted to donate
  - **Frequency and content:** The frequency or style of communication committed to should be sufficient to deliver opportunities for in-depth engagement across all comms

partners

- o **Communicating success:** Communications partners should commit to share stories of success about the money raised through the appeal, and the project that the funds will be spent on within 12 months of the appeal finishing. OTVs for these success stories should be proportionate to the appeal (with 400,000 OTV count as minimum).

- **Communications partners' letters of commitment**

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

- o A statement of interest to support the UK Aid Match appeal pro bono, if awarded
- o A commitment to use the UK Aid Match message and logo in all related content
- o An estimate of the OTVs for each of the channels that they can guarantee for the appeal (eg. footfall, readership, listeners, demographics) by giving details about the reach of each channel/mode of communication
- o An outline of the content and channels that they will provide, as well as the volume and frequency (e.g. 3 articles over 3 months, 3 billboards in 3 locations, 3 number of Facebook posts, etc.)
- o A commitment to share content that communicates the success of the campaign after the appeal ends and describes how the money is being used (within 12 months of the appeal ending).

- **Fundraising plan**

- o A convincing plan to raise at least £100,000, with accompanying insight or evidence from previous fundraising experience to support your breakdown and targets.

- **Appeal messaging**

- o Narrative Project: The tone of the appeal messaging must be in line with the Narrative Project ([see below](#)) with a focus on building lasting solutions
- o UKAM Compliant: The messaging must be compliant with the mandatory UK Aid Match messaging guidance ([see below](#))
- o 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.

- **Capacity**

- o The organisation's experience of running this type of appeal or managing similar communications activity. The staff involved should show they have the relevant experience and resources to deliver this type of campaign.

- **Additional OTVs**

- o Various channels to extend the OTVs beyond the minimum 400,000 provided by pro bono communications partners should be considered, appropriate to the appeal and fundraising target. These could include the organisation's own channels, paid for activity and earned PR OTVs (that are additional to any pro bono media partnerships).



- **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.

## Full application stage

At this stage you will need to fill in the C1 and C2 forms. Your communications plan must demonstrate that you are ready to run an appeal. It will be scored considering:

- **Well thought-out audiences**

We will look for evidence that you:

- Take a strategic approach to identifying audiences for the appeal, use of audience insight particularly welcome
- Ensure there is a mix of existing and new audiences to target with communications.
- Ensure there is a convincing and creative selection of communications partners and channels that will help you reach and appeal to these audiences
- Have considered potential 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. The higher the volume and the deeper and broader the reach the better (vs an isolated, single opportunity)
- Demonstrate an ability to reach new audience groups. This means people and audience groups you do not yet have a recorded relationship with
- Ensure your partners provide meaningful opportunities to view that bring more than just audience numbers to your appeal
- Give your audience the opportunity to actively engage with, share and discuss and champion your appeal content
- Engage your audience with the broader issues beyond just soliciting donations.

- **Strength, creativity and clarity of messages**

We will look for evidence that you:

- Develop main messages about sustainable development rather than 'aid' that reflect

the lessons outlined in the [Narrative Project research](#)

- o Use messages and content that demonstrates how, with some well-placed help, people can be empowered to support themselves and their communities
- o Ensure the bulk of your communications focus on ‘the solution’ and how your campaign works to overcome or alleviate ‘the problem’ that you clearly identified and succinctly outlined in the appeal messaging
- o Design an appeal that gives beneficiaries a voice and portrays them in a dignified, empathetic manner. Avoids ‘othering’ or victimising – both in images and copy
- o Ensure your UK Aid Match messaging complies with the mandatory language required (See [Section 9. Mandatory UK Aid Match messaging](#)) and emphasise that public support enables match funding to take place. It must always be clear that donations will be doubled
- o Demonstrate how your UK Aid Match messages are well integrated. Consider testing them with your audiences. UK Aid Match doubling messaging should not seem an afterthought or relegated to ‘small-print’
- o Help advance the argument that ‘international development works’ through positive proactive messaging
- o Ensure a potential donor knows what their donation will be used to achieve and what the match funding will be used to achieve – if donations and match funding are going towards different areas of work. This must not be fudged, misleading or confusing
- o Have created a compelling ask that is clear about how people’s lives will be improved. Messages about what sums of money will buy must be consistent with your programme bid. (ie. x amount will provide x number of school meals)
- o Keep communications partners on message by giving them a ‘song sheet’ or key message framework/content plan to use.

- **Plan of delivery**

We will look for evidence that you:

- o Create a well thought-through plan of activity that will maintain momentum throughout the duration of your appeal
- o Have a range of activities to engage your donors and audiences – that are suitable to the objectives of your appeal and your audiences
- o In addition to the channels you have considered the angles, hooks and ideas that will sustain public interest
- o Include local and parliamentary engagement opportunities in your plan of activity, including with the local community and MPs
- o Have ways for supporters to engage peers and become advocates for the appeal
- o Adequately consider the resources needed including lead time given you will need messaging signed off.

- **Other OTVs**

We will look for evidence that you:

- o Include a range of opportunities to increase the reach of your appeal through additional OTVs that are appropriate to your appeal and target
- o Incorporate your own channels to reach audiences and, where appropriate/possible,

have included paid-for activity

- o Maximise all earned PR OTVs and explore all the opportunities from regional, trade and national media that your appeal offers.

- **Concurrent public facing activity**

If relevant, we will look for evidence that you:

- o Manage any other concurrent activity that may confuse your audiences to ensure they have a clear idea of what UK Aid Match is
- o 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:

- o Consider the most effective ways to measure the impact and outcomes of your appeal for both communications and fundraising activity
- o Can be clear about which of the metrics listed in the C1 form you are able to provide
- o Survey donors after appeal end to measure the impact of UK Aid Match on their support - include mandatory questions provided by DFID.

- **Reputational risk management**

We will look for evidence that you:

- o Can identify risks to reputation (as opposed to operational or delivery risks)
- o 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:

- o 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 have also stated commitment
- o The plan includes the types of content and channels you will use
- o You are including opportunities to hear from people who are benefiting from your project or who will benefit
- o 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 must:

- o Demonstrate that any provisional agreements are formalised in writing (email, letter),

and provide any details that have changed since concept note stage. You may want to provide communications partners with a template agreement

- o Include any additional partners that have been added at the full proposal stage
- o Additional partners can be added during your appeal process provided they are agreed by The Social Change Agency and DFID. 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
- o 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

Please also include:

- A statement of interest to support your UK Aid Match appeal free of charge, if awarded
- A commitment to use UK Aid Match messaging 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.) 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

Through UK Aid Match the UK government 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).

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

#### Grace period following appeal end

After the appeal end date there is a two-month grace period before the Certified Statement of Income (CSI) must be submitted. This is to allow fundraisers to collect donations and hand them over to the charities. All money collected within this grace period must have been pledged during the appeal, in response to fundraising activity that took place then.

If a cheque dated within the appeal period arrived just after appeal end, this would be eligible for



matching. Any new (as opposed to already pledged) donations that are made after appeal end date, but during the grace period, will not be matched.

## What can be match funded?

### 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. Eligibility for Gift Aid would demonstrate this
- **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 donations are made by individual employees not on behalf of a private sector organisation. Payments can be made via the group or organisation providing all funds were given by individuals and there is written confirmation of this
- **Trust funds:** UK Aid Match will match donations from trust funds where everyone who owns the fund 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 come from 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) submitted up to 2 months after appeal end
- **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.

### Amounts:

- For donations in excess of £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
- There is no size limit on donations, but UK Aid Match will not match over the £2 million cap.

### Charity shops and sales:

- The UK government will match fund the money raised from items sold, only in the instance that the item has been donated and sold within the appeal period. A robust system to evidence this must be in place
- 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
- 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'
- 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.

#### Direct debits/payroll giving:

- We will match donations from new regular donors
- To be eligible, donors must not already be giving to your CSO on a regular basis. The direct debit must have been started (or reinstated) in response to appeal messaging
- We will match **up to 3 regular payments** received within the appeal period and up to 2 months afterwards (the grace period). No more than 3 direct debit payments will be eligible for matching, only 2 may be matched if the payment is set up towards the end of the appeal and the third instalment falls outside of the grace period
- If an existing donor decides to increase their regular donation in response to appeal materials the additional amount will be eligible for matching. For example, if a regular donor increases their monthly donation from £10 to £30 during the appeal, we will match the difference (£20 x 3 months = £60).

#### Events:

- Proceeds from compulsory ticket sales are not eligible for matching
- Optional donations made on top of a compulsory ticket amount, or proceeds from 'donation only' events where people can decide how much they give (including making no donation at all) are eligible for matching
- Voluntary donations made during events if guests are informed about the appeal and how match funding will be spent are eligible for matching This includes proceeds from auctions/raffles held during a fundraiser event.

#### Auctions:

- Proceeds raised from auctions are only eligible for matching if it takes place as part of an existing charity-specific event, for example a gala dinner. Proceeds raised from online auctions or auction only events for specific items are not eligible for matching.

#### Raffles:

- Money raised through raffles is eligible for matching as there is no guarantee of 'winning' or receiving an item in return for your donation.

#### Legacies:

- Legacies are eligible for matching if the person making the legacy donation was informed about the matched appeal and expressed a desire to donate in their will. The donation would have to be collected 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 where funds will be spent 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
- 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 value of 'in kind' donations (ie. non-monetary) such as: time volunteered, locations donated, bands performing
- Proceeds from 'sales' - whether compulsory ticket sales or sale of items
- Donations from online auctions or auction-only events for specific items
- Donations made to a crowdfunding appeal in return for valuable 'prizes' or incentives.

It is the responsibility of the organisation to make sure these exclusions are clear.

## Larger appeals

If the overall fundraising target of your appeal is more than twice the maximum match funding amount (£2 million) you should focus UK Aid Match messaging on a specific area of the wider campaign.

The specific area could be created through the type of fundraising method, activity, channel or location.

You would need to include the fact that 'up to £2m of total donations will be matched by the UK government' rather than any messaging implying 'all donations will be matched'.

All the usual requirements would still apply such as the need for communications partners reaching a minimum of 400,000 OTVs for the particular area.

## 4. Communications partnerships

A communications partnership is a partnership between the CSO 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 these figures have been calculated.

Consider communications partners of all sizes and think creatively about who will help you reach your target audience groups. It isn't only large media outlets that will be best placed to do this. Successful communications partners could include a local cafe, a supermarket chain, a well-known YouTuber or a news publisher, we're happy to consider innovative communications partnerships of all kinds.

A pro bono 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 (this could online or physical space eg. advertising boards, posters and signage).

A communications partner is not an organisation that:

- Provides services for a fee such as paid-for advertising. Though well thought-through, paid-for advertising may contribute valuable opportunities to view your appeal, it cannot count towards your baseline 400,000 OTV and 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 CSOs are encouraged to seek 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 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 successful 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.



## 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.

Communications partnerships are an essential but challenging aspect of UK Aid Match campaigns. You can find advice on how to recruit a pro bono communications and marketing partner on the UK Aid Match website. And feel free to get in touch with the Social Change Agency at [UKAM@thesocialchangeagency.org](mailto:UKAM@thesocialchangeagency.org) to discuss how best to approach this.

## 5. Opportunities to view

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.

The minimum 400,000 unique OTVs must be reached through your pro bono communications partners. To reach 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.

Communications that are limited to individuals on a closed customer database will not count towards the eligibility threshold of 400,000 opportunities to view. However, such channels can and should contribute to total OTVs once you have passed the eligibility threshold.

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 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 OTVs provided by 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 / viewers / 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><b>Note:</b> 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). 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.**

## How to calculate OTV (example)

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
<b>Guilty Feminist</b>			
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
<b>Stylist</b>			
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
<b>Evening Standard</b>			
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
<b>TOTAL</b>			<b>5,894,622</b>

## 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. There are no specific target audiences for the scheme within the UK population.

We are looking for CSOs to reach new audiences, meaning new audiences *to your CSO*. People and audience groups, you do not yet have a recorded relationship with. This could be measured by new donors but is also evidenced through new audiences accessed by 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 as well as increase the depth of engagement with audiences previously reached.

Your application should explain your choice of audiences, how you have identified them 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. Advice from previous UK Aid Match charities on how they reached new audiences will soon be available on the UK Aid Match website.

Direct communications to existing supporters should of course also 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.

You should think about and outline key moments, hooks and stories over the three months. This could be particular interest days or relevant external events, stories planned from content gathering trips, relevant statistics and research you can release, inventive fundraising activities, public holidays and celebrations.

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

- If there are appropriate opportunities to engage local parliamentarians or the Secretary of State - ie. launch events, photo opportunities or fundraiser activities these should be exploited
- 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. For the launch press release you must request a quote from the Secretary of State and include this (subject to availability). Notes to Editors about UK Aid Match must also be included. Further details on this process will be shared with successful applicants.

## Resourcing, project management and lead-in time

You will need to think about the resources available and timing necessary to deliver your plan of activity. In particular consider the team structure and specific colleagues who will need to be part of the activity.

Take into consideration that appeal messaging and content must be approved by The Social Change Agency and DFID, which will take additional time.

Experience shows that charities will benefit from having a dedicated, full-time project manager to help coordinate these approvals.

Charities might also need support from PR and creative agencies to make their messaging stand out.

## Approvals

If successful in your application, you must ensure that The Social Change Agency gives approval at every stage of your appeal development. The Social Change Agency must approve your key messages document before any other materials can be developed. All further content should draw from the approved messaging.

In the lead up to launch and in the early stages of your appeal The Social Change Agency will work closely with you on your messaging and other core documents, as well as approving each piece of content.

Once all content is consistently being approved with no issues, approval will not be required on all content. You will continue to liaise closely with The Social Change Agency on the appeals progression and upcoming activity.

No content or information about your appeal or UK Aid Match activity can be released without The Social Change Agency prior approval.

## 8. Messaging and branding

### Why are communications assessed alongside the project?

Public attitudes toward global development are increasingly negative. How CSOs communicate their work is vital to encouraging the public to engage with international development work and actively support it.

Encouraging public engagement should go beyond simply prompting donations, CSOs should consciously seek to promote a positive dialogue about international development and the efficacy of their work. CSOs should actively seek to counter negative narratives around development work through creative, positive, solutions focused messaging.

Encouraging a dialogue could mean (but is not limited to) encouraging peer to peer sharing, social media, volunteering, event-attendance or organising.

### Narrative Project

The Narrative Project aims to increase public support for global development.

It is based on research across four countries (U.S., UK, France, Germany) that found the biggest barrier to public support is a sense of cynicism, distance, and futility.

However, the research shows we can shift the perspectives of members of the public who are unsure of the third sector's impact.

To do this communication must be framed around independence, shared values, partnership and progress.

Please read more on the [Narrative Project research here](#).

### Messaging

CSOs should implement Narrative Project messaging themes into social media posts, emails, newsletters, blog posts and all public-facing communications.

Appeal messages should clearly and accurately communicate how public donations and match funding are expected to improve people's lives in a lasting way.

Appeal messaging will of course be addressing 'a problem', which should be clearly identified and succinctly outlined, however the bulk of your communications should focus on 'the solution' and how your campaign works to overcome or alleviate that problem.

From experience, the most compelling communications put match funding and the idea of ‘doubling’ at the heart of their creative and core messaging.

Strong messaging:

- Avoids sweeping statements and generalisation
- Gives concrete examples of progress and impact
- Avoids making people feel guilty, blamed, helpless or pitying
- Emphasizes core human values and priorities that are relatable to all
- Avoids using jargon or well-worn clichés
- Uses simple, clear, accessible language.

## Appeal visuals

Images and film 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 unrelated work.

Strong imagery:

- Avoids objectifying or ‘othering’ people you work with
- Shows those you work with as active, not passive
- Does not use imagery that evokes pity or helplessness
- Shows those you work with as dignified individuals the viewer can relate to.

Mandatory requirements:

- 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
- UKAM logo should be present in images and films (unless agreed otherwise)
- Appropriate consent has been gained by the CSO to use any images, audio, video and quotes.

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





## Case studies

Stories, pictures, and voices (written, audio, video) offer a powerful means of engaging the public and helping them relate to those who you work with. As with imagery, stories should emphasize common humanity and shared values. People should not be objectified, victimised or ‘othered’.

### Communicating match funding

- The fact that your appeal is receiving match funding must be clear to all
- How UK Aid Match funds will be spent must be clearly communicated on your website and all materials. In particular it must be clear if public donations and match funding are being spent on different areas (ie. public donations will go towards core costs, match funding to a specific project)
- There should be an emphasis on how the public or individuals act of donating allows match funding to take place, and therefore more people to benefit.

## 9. Mandatory UK Aid Match messaging

All appeal materials must carry the UK Aid Match branding (both the logo and one of the written matching/doubling 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.

These are the mandatory requirements:

### Describing UK Aid Match: the UK Aid Match mention

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





## Option 1

*Pre-appeal:* “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.]”

*During appeal:* “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.]”

## Option 2

*Pre-appeal:* “From DATE to DATE, all public donations to NAME OF APPEAL will be doubled by the UK government.”

*During appeal:* (After appeal has launched) “Give before DATE and all public donations to NAME OF APPEAL will be doubled by the UK government.”

## Option 3

*Pre-appeal:* “From DATE to DATE, the UK government will match all public donations to NAME OF APPEAL.”

*During appeal:* “Give before DATE and the UK government will match all public donations to NAME OF APPEAL.”

Any variations must be agreed with The Social Change Agency 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’ ‘your donation will be doubled’
- 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

- Phrases that don't make clear the appeal is happening over a limited time with an end date.
- Phrases or content that does not make clear the doubling is occurring over a limited appeal time.

## Using the UK Aid Match logo and messaging

### UK Aid Match logo requirements

CSOs should use the UK Aid Match logo in their UK facing communications both during their appeal and when reporting back to the public. The logo should be easy to read and a decent size. The logo should be used in full colour on a white background wherever possible. Please read the UK Aid Match logo guidance for further information.

Mandatory requirements:

- Do not distort, change the colour or rotate the logo
- Observe the exclusion zone. Its width is determined by the width of the letter 'U' in UK. The UK aid logo should always have a border of clear space to ensure it stands out clearly
- Do not incorporate the UK Aid match logo into any other logos. 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
- The logo should not be used on any materials that are not part of the appeal
- If working with other partner logos, 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.

Any exceptions must be agreed with UK Aid Match in advance.

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. We recognise there are occasions (particularly with PR activity) where CSOs may not have editorial control.

Please note that there is a flag-free version of the logo available for use in Northern Ireland. if you require it please email: [ukaidmatch@mansiondaniels.com](mailto:ukaidmatch@mansiondaniels.com)

### UK Aid Match messaging requirements

- 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 as an afterthought
- Whenever an individual is prompted to donate, they should understand that their donation will be doubled by the government
- You must also ensure that your messaging meets any fundraising guidelines and that any claims about what money will achieve are accurate.

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.

## Digital

We encourage innovative ways of using social media to actively engage your audiences. Social media is more effective when strong images and creative videos are used. You should seek to incorporate the UK Aid Match logo and messaging in these images, which can save copy on Twitter. We will be looking for content that is shareable

Communicating UK Aid Match messaging on digital platforms:

- Where possible, references to the UK government in online communications should be linked to a DFID online presence
- Use #UKAidMatch, #UKaid and #UKgov hashtags and the Twitter handle @DFID\_UK and @ukdfid on Facebook when referring to your UK Aid Match appeal. Additional hashtags may be agreed
- UK Aid Match logo must be incorporated in all appeal related videos. Ideally the logo would appear at the beginning and throughout.

## 10. 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.

## 11. Communicating success post appeal

Communicating success of the project to the public is a requirement of all UK Aid Match grant holders and happens three times throughout the project's life cycle: three months after the appeal, at the mid-point of the project and at the end of the project. It provides an opportunity for UK Aid Match grant holders to share successes and milestones from their project to the public, which in turn increases transparency in how the UK aid budget is spent. These communications moments are known as report backs.

### Report back 1 (within three months of appeal end)

The first report back is focused on confirming the total amount raised during your appeal, reiterating the aims of the project and how the money will be spent and thanking the donors. This report back is usually expected to happen about three months after the end of the appeal.

## Report back 2 and 3 (mid-point and end point)

The second and third report backs are focused on what has been achieved during your project. This can be milestones or stories about the participants in your project.

### What you need to provide

- **A list of activities you have planned for reporting back to the public and when they will be happening.** Activities could include: events, potential photo opportunities, engaging your local MP, press releases, activities through your media partners, social media coverage. This will allow DFID to spot opportunities to amplify your activities. The earlier you are able to share this plan, the better.
- **Send over your materials to the MannionDaniels Communications Team** ([ben.anderson@mansiondaniels.com](mailto:ben.anderson@mansiondaniels.com) or [Charlie.covington@mansiondaniels.com](mailto:Charlie.covington@mansiondaniels.com)) **for sign-off. This must occur no later than two weeks before they are being published.** Specifically, we will be checking that you have included UK Aid Match messaging regarding the money raised and the UK aid logo.

## 12. Reporting and evaluation

**You will be given templates and instructions on how to evaluate 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
- Monthly reports are shared with DFID to evaluate the performance of the cohort of CSOs.
- 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.
- After the appeal is complete, you are also required to report back your success to the public. This will happen at 3 months after the appeal (to announce the appeal total), at 9 months after the appeal (to update on project progress), and at 12 months (to update on project progress).

We will provide successful CSOs with templates for the monthly reporting 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.