

# UK Aid Match Round Five: Communications and appeal application rule book

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## Overview

To be considered eligible for UK Aid Match applicants must:

- Be registered with the Fundraising Regulator. The exception to this rule is applicants 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 organisation’s wider activities
- Use a pro bono communications partnership (see section on [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. This

number should not include the applicant's existing supporter database; for example, social media followers or mailing lists acquired previously.

Fund appeals will not be matched 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 cannot be funded in the [project guidance document](#).

Applicants must also:

- 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; for example, attending an event, taking part in a challenge or social media activity celebrating the appeal with the charity and its key fundraisers
- 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
- Where possible, references to the UK government in online communications should be linked to one of the Foreign, Commonwealth & Development Office's (FCDO) social media accounts; for example, [Twitter](#), [Facebook](#) and [Instagram](#).

### Round Five focus

COVID-19 is likely to continue affecting the way CSOs are able to fundraise, particularly impacting in person and out of home activities. We are keen to support CSOs in trialling new digital fundraising mechanisms to respond to this situation. Round 5 will look for CSOs whose appeal plans include fundraising mechanisms that are facilitated or organised digitally and represent a new, or experimental, approach for that organisation. This could mean anything from re-thinking traditional challenges and events, activating peer to peer engagement strategies, exploring new incentives and digital journeys to trialling gamification.

## Funding the appeal

Match funding from the UK government must be used for the activities set out in the 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 is required within the proposed project budget. Where match funding and public donations are planned to be spent on different things, the division must always be clearly communicated.

## Helpful resources

- [The Code of Fundraising Practice](#)
- [Information about registering with the Fundraising Regulator](#)
- [Information about the Scottish Fundraising Standards Panel](#)
- [Information about the Charity Commission and fundraising](#)
- [Information about the Information Commissioner's Office and charities.](#)

## 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 'Opportunities to view' section for more detail.](#)
- **Out of home (OOH):** Outdoor advertising such as bus stops, train stations and roadsides.
- **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:** Fundraisers defined as 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.

- **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 and networks.
- **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.
- **UK Aid Match mention:** Messaging does not 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:** 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, explain your 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.
- **Media monitoring:** It is recognised that not all CSOs can use paid for media monitoring services. In this case, it is recommended that Google alerts are used to monitor online coverage, source coverage that has appeared through partnerships or other intelligence and scan the media outlets that can be accessed.
- **Social media monitoring:** It is recognised that not all CSOs can use paid-for media monitoring services. Calculate OTV of posts using number of followers on the account. You can also count likes, comments and shares yourself (the sum of these would give your engagement figure). There are also some free social media tools available such as Hootsuite and TweetDeck.

### Key stages of the appeal

The below outlines the key stages of the appeal from application to appeal end.

### Concept note

Complete and submit the following via the [online portal](#) by the deadline.

- Letter/email of commitment from each of appeal communications partner(s) – [see 'Communications partnerships' section for more detail.](#)
- [A1 appeal communications form](#)

- [A2 appeal communications spreadsheet.](#)

Applications are assessed based on the above information. Shortlisted applicants will be informed in late February 2021 and invited to submit a full application proposal.

### **Full proposal**

More information on the full application stage will be outlined once the concept note stage closes.

### **Preparation of appeal communications**

Work can start on preparing appeal communications from confirmation of a successful application, while due diligence is underway. At this stage, applicants should be in regular contact with an assigned contact from The Social Change Agency.

Organisations must not start to widely publicise the match funding of their appeal or solicit donations before the due diligence assessment has been finalised and approved by the FCDO. However, it is acceptable to distribute information about the appeal to specific fundraising or volunteer networks, so they can prepare for the appeal launch.

Organisations may also recruit potential challenge participants 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.

### **Messaging approval**

Key messages for the appeal, including references to UK Aid Match doubling, must be 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**

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

Applicants have a responsibility to ensure that activities outlined in your communications plan are carried out. Any changes or revisions, including additions, should be drawn to The Social Change Agency's attention at the earliest opportunity.

### End of appeal and first communication of success to the public

Once the total of your appeal has been verified, CSOs must communicate the total raised by their appeal to the public. This activity will ideally take place within three months of the appeal end. [Find out more in the 'Communicating success post appeal' section.](#)

## Assessment stages and criteria

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

### Concept note stage

Appeals must be three months in length and focus on the FCDO eligible countries. At this stage, applicants must complete and submit the A1 and A2 forms. Appeal communications will be assessed using the criteria below.

### Communications partnerships

- **Audience reach:** pro bono communications partnerships should provide a proportionate OTV to fundraising total with a minimum 400,000 OTVs
- **Compliant messaging:** Communication partners should explicitly 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 communications partners
- **Communicating success:** Communication partners should commit to share stories about the total amount raised during the appeal, and how the money is being used while the project is in progress.

### Communications partners' letters of commitment

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

- A statement of interest to support the UK Aid Match appeal pro bono, 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 by giving details about the reach of each channel/mode of communication; for example, demographics readership, listeners, footfall.
- An outline of the content and channels that they will provide, as well as the volume and frequency
- A commitment to share content that communicates the success of the campaign after the appeal ends and how the money is being used while the project is in progress.

### Fundraising plan

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

### Appeal messaging

- [Narrative Project](#): the appeal messaging must be in line with the Narrative Project with a focus on building lasting solutions
- UK Aid Match compliant: the messaging must be compliant with the mandatory UK Aid Match messaging guidance. See [‘Mandatory UK Aid Match messaging’ section](#).
- Messaging should be creative, relatable, and compelling. It should centre on the doubling messaging and must make it clear to the public how their money will make a difference and how UK Aid Match funding will be spent.

### Capacity

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

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

More information on the full application stage will be outlined once the concept note stage closes.

## Fundraising

### Donations

Through UK Aid Match the UK government will match financial donations from members of the UK – including the Crown Dependencies: Jersey, Guernsey and the Isle of Man - public up to a maximum of £2 million per appeal, subject to a 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 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 submit 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 will not be matched. Following this grace period, grant holders have two weeks to submit their CSI.

### What can be match funded?

#### Monetary donations from UK-based donors - including the Crown Dependencies: Jersey, Guernsey and the Isle of Man

- **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 two months after appeal end.
- **Philanthropic organisations:** 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.

### Amount that can be matched

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

### Donations from charity shops and sales

The UK government will match fund 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. Charity shops must not be the only communications partner for the appeal. The stock appeal should focus on a category of stock, for example, 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 the organisation on a regular basis. The direct debit must have been started (or reinstated) in response to appeal messaging.

We will match up to three regular payments received within the appeal period and up to two months afterwards. No more than three direct debit payments will be eligible for matching, only two 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, UK Aid Match 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 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 should be given details of this project.

### **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.

### **Larger appeals**

If the overall fundraising target of the appeal is more than twice the maximum match funding amount (£2 million) applicants 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.

### **What can't be match funded?**

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

- Financial donations from for-profit organisations.
- The Gift Aid element of donations.
- The proceeds of selling in-kind donations made directly to the organisation
- Donations from existing regular donors as this represents income that is already guaranteed to the organisation rather than given in response to the appeal
- The value of 'in kind' or non-monetary donations 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.

### **Communication partnerships**

A communication 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 communication 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 is not 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, and innovative digital communications partnerships are particularly welcome in this round.

A pro bono communication 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. Though paid-for advertising may contribute valuable opportunities to view the appeal, it cannot count towards the 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 – for example, graphic and digital design, marketing and PR, media buying. 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
- 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
- Communication 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 communication partners.

### **Other partners**

Applicants may want to engage other partners in the appeal, such as sponsors or corporate partners. Please note that these must be approved as part of the 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. Advice on [how to recruit a pro bono communications and marketing partner](#) is available on the UK Aid Match website.

### **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 the 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. Applicants 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 the eligibility threshold is passed.

UK Aid Match recognise there are many ways of estimating opportunities to view. Where possible, applicants should use figures from an established, recognised audience measuring body for that channel or industry. Applicants should calculate OTVs realistically and use the communications plan documents to explain 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 the appeal message. Similarly, it would not be appropriate to include the number of unique monthly users for a website if content is only on the home page for two days.

**When calculating the OTVs, applicants 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**

Do not overestimate opportunities to view. Unsubstantiated figures could damage the credibility of the application and appeal report.

<b>Channel</b>	<b>Opportunities to view</b>
Partner mailing lists	Try to get hold of partners' engagement data or average open rate. If this is not possible, count the readership or distribution list figure. Count this figure once, even if multiple communications are sent to the same audience.
Owned mailing lists	Count your mailing list as the OTV, count this once.

Articles in magazines and newspapers/TV/radio broadcasts	Count the number of readers/viewers/listeners for the day or time of publication/broadcast. E.g. Divide a monthly readership count by 30 (for one day's coverage)
Adverts in newspapers, TV, radio, social media, billboards etc.	Count the advertising reach (e.g. figure given by the advertising vendor)
Events	Count the attendance (providing that the appeal messaging is likely to be viewed by all attendees)  If you have a stall or display at a larger event, make a reasonable calculation for the proportion of attendees who may have seen this.
Retail or restaurant	For retail use the average footfall (providing the appeal is very visible) for the period that the messaging is on display. If it is a donation request at a till use the number of transactions in the period. For restaurant partnerships, assuming the messaging is accessible to everyone (such as on a menu), include the total number of covers in that period.
Digital	<u>Activity</u> For reporting on owned social channels, do a block OTV estimation of your social activity. You do not need to report individually on every social post made on your own channels. For reporting on any social media activity outside of 'business as usual' posting, include this in a separate line.  <u>Opportunities to View (OTVs)</u> To calculate the OTV figures use follower count for the social media account. Whilst this is not a reflection of actual reach, it



	<p>allows for consistency across all accounts and channels, even where it is a third party and you are unable to access more detailed figures. Count this figure once, even where there are multiple posts on the same account.</p> <p><u>Engagement calculation</u> For the engagement calculation required on the C2 add a figure for engagement as provided by the social channels – likes, clicks and shares.</p> <p><u>Websites</u> For your own website use your unique page view figure as the OTV count. For external channels where you are unable to get these figures you should ask for an average monthly or daily page view figure and use this.</p> <p>If your content is online for a day and you have a monthly view figure, you should divide this by 30, adjusting accordingly for time on display. If your content is not on the front page, you should also adjust your calculation to reflect a reasonable proportion of views.</p>
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### **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 the 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.

### **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.

UK Aid Match is looking for applicants to reach new audiences, meaning new audiences to your organisation. 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 communications partners.

Organisations 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.

The application should explain the choice of audiences, how you have identified them and what methods and messages will be used to reach them. Applicants should explain why the proposed appeal activities will engage the chosen target audiences effectively. Insight, evidence and testing with audiences is encouraged. Advice from previous UK Aid Match charities [on how they reached new audiences](#) is available on the UK Aid Match website.

Direct communications to existing supporters should also be included in the appeal communications plan and must also adhere to UK Aid Match guidance.

### **Plan of delivery**

Once objectives, audience and messaging are clear, develop a plan of activity that will maintain momentum throughout the duration of the appeal. This should include a range of activities to engage donors and audiences, suitable to the objectives of the appeal.

Applicants 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 – and detail how you will 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 – launch events, photo opportunities or fundraiser activities - these should be exploited.

The CSO should also make full use of media partnerships and their own channels to generate public awareness of their local and parliamentary engagement activities, and the support of UK Aid Match.

### **Website**

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

### **Press release**

CSOs must commit to at least one press release to launch the appeal and one press release to announce the appeal total; additional regional and specialist press releases are also strongly encouraged. For the launch press release applicants 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**

Applicants must think about the resources available and timing necessary to deliver the plan of activity. 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 the FCDO, which will take additional time.

Experience indicates that charities 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 messaging stand out.

## Approvals

If successful, applicants must ensure that The Social Change Agency gives approval at every stage of the appeal development. The Social Change Agency must approve the 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 the 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's prior approval.

## Messaging and branding

### Why are communications assessed alongside the project?

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

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 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 the potential to 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**. Read more on the [Narrative Project research](#).

## 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 be addressing 'a problem', which should be clearly identified and succinctly outlined, however the bulk of the 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 the appeal to life. UK Aid Match expect 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
- UK Aid Match 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.

Here are examples of the types of images we are looking for:



### 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 the 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. It must be clear if public donations and match funding are being spent on different areas.
- 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.

## 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, the FCDO reserves the right to refuse to match any donations that are generated by that element of the appeal.

## Describing UK Aid Match in communications

CSOs must use **one** of the following **descriptions across 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 The Social Change Agency before use.

### **Unacceptable ways to describe UK Aid Match and match funding**

- Phrases that do not recognise the UK government’s role; for example, ‘We will double your donation’ and ‘your donation will be doubled’
- Phrases that make UK Aid Match sound like an organisation; for example, ‘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 several projects/issues
- Phrases that do not 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 UK facing communications both during the 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. [Read the UK Aid Match logo guidance for more 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 the 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 must 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 the logo is expected 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.

There is a flag-free version of the logo available for use in Northern Ireland. If required, contact: [ukaidmatch@mansiondaniels.com](mailto:ukaidmatch@mansiondaniels.com)

#### UK Aid Match messaging requirements

- The 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
- Applicants must ensure that 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.

## Social media

UK Aid Match encourage innovative ways of using social media to actively engage audiences. Social media is more effective when strong images and creative videos are used. Applicants should seek to incorporate the UK Aid Match logo and messaging in these images, which can save copy on Twitter. Content that is shareable is particularly welcome.

Communicating UK Aid Match messaging on digital platforms:

- Where possible, references to the UK government in online communications should be linked to a FCDO online presence
- Use #UKAidMatch, #UKaid and #UKgov hashtags and references to the UK government in online communications should be linked to an FCDO online presence. Including the Twitter handle [@FCDOGovUK](#) and [Facebook](#), [@foreignanddevelopmentoffice](#) on Instagram.
- UK Aid Match logo must be incorporated in all appeal related videos. Ideally the logo would appear at the beginning and throughout.

## 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, the 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.

## 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 the appeal, reiterating the aims of the project and how the money will be spent and thanking the donors. This report back is usually expected 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 the project. They occur at the midpoint and end point of the project.

Grant holders will be provided more detail about the report back process after their appeal ends.

## **Reporting and evaluation**

**Successful applicants will be given templates and instructions on how to evaluate the 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 the FCDO. Successful applicants are expected to support evaluation:

- When the appeal is live, you will be asked to provide a short performance summary of the appeal and key metrics once a month, and to provide inspirational stories about fundraisers for FCDO to feature in its communications
- Monthly reports are shared with the FCDO to evaluate the performance of the cohort of CSOs
- At the end of the appeal, you will be asked to evaluate the performance of the appeal including fuller metrics and feedback/learnings and to provide post code data for donors. This data will be used to identify regional support for UK Aid Match; individual donors will not be identified. 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.
- For the life of the grant you will be asked to provide an annual report on reputational risk.

Successful applicants will be provided 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 the FCDO.