

# UK Aid Match round 5 guidance

## Webinar Questions and Answers 5 November 2020

### Contents

Appeals and communications .....	2
Eligibility .....	2
Expression of interest/commitment letters.....	4
Audience .....	5
Communications partners .....	5
Digital Innovations .....	6
General.....	6
Appeal timing .....	9

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Matching your  
donations with



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## Appeals and communications

### Eligibility

**Q: Does at least £100,000 have to be raised to apply for UK Aid Match funding?**

A: Yes, £100,000 is the minimum fundraising target eligible for a UK Aid Match appeal

**Q: Is the £100,000 fundraising target from individuals only or does this include other funding sources?**

A: £100,000 is the minimum fundraising target eligible for a UK Aid Match appeal, this can be raised from UK taxpayers – including the Crown Dependencies, Jersey, Guernsey and the Isle of Man – communities, trust funds and non-profit philanthropic organisations. Please consult the [Communications and Appeals guidance](#) carefully, as conditions must be met for different types of donations.

**Q: Is the Jersey Isle within the eligible geographical area? We would like to work with a Communications Institution from Jersey.**

A: Yes. Donations from UK-based donors are eligible, which includes the Crown Dependencies, Jersey, Guernsey and the Isle of Man.

**Q: If we don't reach the target we set to raise in the appeal, will we still get the matched funding for what we do raise?**

A: This will be decided on a case by case basis following your appeal. As part of your application you should present an appeal which credibly aims to raise at least £100,000.

**Q: Can a communication partner also have their name and logo added to project dissemination information alongside the UK Aid Match logo?**

A: Yes, this is acceptable. All published materials must comply with the fund rules on visibility of the UK aid logo, more details of which can be found in the [Foreign, Commonwealth & Development Office \(FCDO\) branding guidelines](#)

**Q: Would ticket sales for a lunch event or product sale, and pledges made during the event count in UK Aid Match?**

A: Ticket sales would not be eligible as this is a sale rather than a donation, pledges made during the event (as long as it was held within the appeal window) would be eligible for matching. Any optional donation added on top of a ticket sale price, would be eligible.

**Q: Can you explain the eligibility of donations made through cause-related marketing (for example, purchases of 'special edition' appeal products)?**

A: Compulsory ticket sales for any event would not be eligible for matching. Pledges made during the events in response to specific information about the appeal, including how the match funding will be spent, would be eligible.

**Q: Do donations from churches count as donations that could be matched? Might they only be able to count if they were from fundraising within the church (for example, sponsored events, fetes) rather than donations straight from church funds?**

A: UK Aid Match will match donations raised by community groups such as churches (also including schools and groups of individual employees). These payments can be made from the group/organisation, provided that all funds were donated by individuals. Written confirmation of this will be required.

**Q: Can Gift Aid be a part of the match total?**

A: No, Gift Aid portions of donations will not be matched.

**Q: If an influencer/celebrity is based outside the UK but has a global reach is that okay?**

A: Yes, this would be acceptable as a communications partner, however you must be able to verify that all donations to be matched are from UK taxpayers.

**Q: Do all the contributions from the applying organization need to come from new people, not from our existing donor base?**

A: No, not all the contributions need to come from donors new to your organisation, however part of the assessment of your appeal proposal will consider how your planned appeal seeks to reach new donors.

**Q: On the appeals side, the guidance says at least 10% of project funds should be raised through the appeal. How is this possible as for every pound we raise UK aid matches? Does that not make it a requirement to raise 50% of project funds?**

A: There is no requirement that a certain proportion of the project budget be funded directly by public donations. At least 10% of the project budget must come from sources other than FCDO. For example, a total proposed UK Aid Match project budget of £1 million should include a minimum of £100,000 from other sources. Ideally, this should be sourced from the public donations to the appeal or can be provided from other donors.

**Q: How are Opportunities To View (OTVs) calculated? For a social media influencer, would it be based on follower count or some other metric?**

A: Examples of different OTV calculations are available on page 16 of the [Communications and Appeal guidance](#). For social media influencers you should count the total followers for the account once, to be consistent, but only once. The whole follower count should not be included for all individual posts.

**Q: You mention that the OTVs must be proportional to the fundraising amount, that is, 400,000 OTVs for a £100,000 appeal. How do we work out what is a reasonable OTV for a £1 million project?**

A: There is no hard formula, OTVs, appeal activities and fundraising targets are looked at in combination. Some communications partners may give a very high number of OTVs, but low depth of engagement (for example, one tweet on an account with a large following). Each appeal's unique combination of pro bono communications partner OTV, appeal activities and fundraising target are looked at on their own merit.

**Q: Is there a limit to the size of Trust or Foundation donations?**

A: No, there is not a limit to the size of Trust and Foundation donations.

#### **Expression of interest/commitment letters**

**Q. How much detail do we need from communications partners for the concept note form?**

A: We no longer require formal commitment letters from communications partners stipulating all the details of the coverage they will offer, but we would like to see some statement of interest to show that a relationship has been started and there is an interest in supporting your appeal should you be successful.

**Q: Commitment letters from communications partners are no longer needed, but question 1.7 on the application form requires us to upload expressions of interest. Please could you explain the difference between a commitment letter and an expression of interest?**

A: An expression of interest is a less formal requirement than the commitment letter. It does not need to state the level of engagement or an explicit commitment to all parts of the UK Aid Match process, for example reporting back. Interest in providing pro bono publicity should be in writing but does not need to be signed. This requirement was reviewed based on applicant feedback.

## Audience

### **Q: Does UK Aid Match have target audiences and media channels they want British charities to engage (over and above each charity's own target audiences)?**

A: No, but applicants are encouraged to think about how you can reach new audiences to your charity through the appeal and communications partners. Clearly identified audience groups with specific channels identified to reach them will strengthen your appeal proposal.

## Communications partners

### **Q: Can you have more than one communications partner?**

A: Yes, you should consider partners of all sizes and think creatively about who will help you reach your target audiences.

### **Q: Does the pro-bono partnership have to be with an organisation? Can it be an individual, for example a celebrity partner of the charity?**

A: No, partners do not have to be organisations, it can also be with individuals such as influencers or celebrities. All partners should be separate from the applicant organisation with its own established audience, giving support free of charge and providing its own channels.

### **Q: Will applications that have communications partners exclusively from local/regional media outlets be valued as highly as applications that have communications partners exclusively from national media outlets?**

A: Yes, it will be as highly valued. Applicants are encouraged to consider a range of communications partners and the depth and quality of engagement they can provide.

### **Q: Can we add additional media partners after the plan is submitted/concept note stage?**

A: If invited to full application, applicants would be able to introduce new communications partners. Communications partners can be secured and added at any stage of the appeal, subject to due diligence.

## Digital Innovations

**Q: Does the new digital element have to be something we have never tried before? We have experimented with some things, which we would like to roll out further, is this acceptable? Will innovative/experimental ways of working with communications partners also count as 'new fundraising mechanisms'?**

A: It doesn't have to be totally un-tried to be innovative for your organisation, please just indicate how this is furthering an experimental approach. New approaches to working with communications partners could absolutely qualify as new fundraising mechanisms.

**Q: Are you expecting the majority of appeal income to come via digital channels or just a good demonstration of an increased use of digital innovative channels, even if it doesn't lead to the bulk of your income?**

A: We're looking for digital fundraising innovation but there is no expectation that this should form the bulk of your fundraising total.

**Q: Could we start something 'new to us' prior to the appeal or do we need to 'save' it? We have a new digital strategy in development but would prefer not to delay some of our new ideas if they don't happen to coincide with the appeal window.**

A: There is no need to delay a new approach artificially for the launch of the UK Aid Match appeal. A 'new' digital fundraising approach doesn't need to be totally un-tested by your organisation, as long as you can describe how your approach is a recent innovation in the application.

## General

**Q: If you normally run your appeals through an outside agency, are you able to continue doing this?**

A: There are no restrictions around working with outside agencies. The agency will need to be on board with working the Narrative Project guidelines into communications and using the UK Aid Match brand guidelines.

**Q: The guidance states that the UK Aid Match appeal should be the main or only public-facing activity during this period. Can you define what 'main' means in this instance, and on what basis exceptions would be made?**

A: If the UK Aid Match appeal is the only campaign you are running during those dates then all unrestricted donations that come in are deemed eligible for matching, as it is likely that a donor saw your appeal communications. If you are running a concurrent appeal over your

appeal dates you will need a way to split out and track donations in order to only match those that come in response to your UK Aid Match appeal. It would also be problematic to run any concurrent campaigns that clashed in their messaging or tone with your UK Aid Match appeal.

**Q: During the appeal will the public donate to our charity via our website or via UK Aid Match?**

A: Donations are raised through your own fundraising channels, not UK Aid Match.

**Q: How should communications risks be considered?**

A: Communications risks should be reputational rather than project based. Think through all the different things that could possibly go awry with your public communications, how likely this is to happen, the possible impact it would have if it did and how you would mitigate this. Think as well about the news agenda and if there are any specific areas your organisation or work might come under extra scrutiny.

**Q: Does the appeal need to focus on the focus area of the project?**

A: Not solely, but this should form part of the messaging.

**Q: Do we need to include imagery at concept note stage?**

A: It's not a requirement but you can include any representative imagery that you think will reflect the imagery that you plan to use in your appeal.

**Q: The guidance says that images need to be related to the project - how do you define related? Does it need to be same country? Can we use images from similar projects in another country? With it being difficult to collect content at the moment, will this be more flexible than it may have been in the past?**

A: Images need to adequately reflect the scope of your project and work. These could be from ongoing projects that are similar, or past projects if necessary. It may be that your unrestricted public donations are going towards your broader work, therefore it is fine to use images from this work too.

**Q: On fundraising, is there a clear definition of what is considered an 'existing regular donor'? That is, those whose giving would not be considered as eligible to match unless it was an uplift. Is it solely around regular monthly giving or would an existing major donor - for example who gives every year - be considered to fall into that category?**

A: Someone with a regular direct debit or standing order would be considered a regular donor and therefore ineligible for matching as their donation would have been made

regardless of UK Aid Match messaging. If someone gives regularly but has nothing automatic set up, then their donation would be eligible for matching if they donated during your appeal window.

**Q: [BOND](#) recently brought out language guidance (decolonialising language). Is this something we need to ensure in our messaging (for example, they discourage the use of the word empower)?**

A: Yes, appeal messaging should absolutely reflect recent research and best practice.

**Q: Please could you explain what you mean by 'peer to peer engagement'?**

A: Peer to peer engagement is when you encourage your supporters to become champions for your cause, spreading the word and recruiting more supporters on your behalf. This could take the form of sharing content that encourages further sharing and engagement, fundraisers, crowdfunding or something less formal where supporters are encouraged to advocate for you.

**Q: Do we have to set out our content gathering strategy given restrictions on travel?**

A: This isn't explicitly required in the concept note or full application, but you are expected to include feasible content gathering plans. You could detail a best-and worst-case scenario if this felt appropriate. You will need to provide details of any content gathering trips if successful so that we can conduct any necessary safeguarding due diligence.

**Q: Should we cite research to back up our communications strategy?**

A: Although not a requirement, if you have any research that will back up your communications plans please do include this.

**Q: What kind of messaging example do you want us to give in the concept note? Should we provide it within a certain context? For example, an email or a landing page?**

A: The more built up the messaging is at this stage the better we can visualise what the communications for the appeal will look like. It is up to you whether you provide it within the certain contexts stipulated above.

**Q: Can we use similar creative ideas from existing advocacy campaigns in our UK Aid Match appeals?**

A: Yes, you can use similar creative ideas from your existing campaigns, but the doubling should never seem like an afterthought or 'tacked on' to the appeal. The content will need to meet the Narrative Project guidelines and all the other UK Aid Match guidance.



## Appeal timing

### **Q: Is there a deadline by which you expect the appeal to launch by?**

A: This will be determined on a case by case basis if there is a rationale for starting at a specific time. We expect appeals to launch within six months of funding approval, by the end of January 2022.

### **Q: How early can appeals launch?**

A: It is anticipated that applicants will be informed of the outcome of the full application process in July 2021 following which all successfully shortlisted applicants will undergo a due diligence assessment. This assessment must be concluded (and approved by the FCDO) prior to the launch of any appeals. It is anticipated that appeals could launch from October 2021.

### **Q: Can the three-month fundraising period be decided by the applicant? Or do they have to commence in October 2021?**

A: The start date of the appeal and fundraising period is up to the applicant, we expect most appeals to begin between October 2021 and January 2022, up to six months after applicants are expected to be informed.

### **Q: Can appeals be less than three months long?**

A: The norm is a three-month appeal window in order to raise as many eligible donations as possible. The appeal could technically be shorter, but we would welcome an explanation and justification for this.