**Planning and preparing for Funding Template**

**Current grants**

|  |  |  |  |
| --- | --- | --- | --- |
| **Grant** | **Beneficiary** | **End date** | **Notes** |
|  |  |  |  |
|  |  |  |  |

**Priority list of grants to apply for**

|  |  |  |
| --- | --- | --- |
| **Grant** | **Beneficiary** | **Outline** |
|  |  |  |
|  |  |  |
|  |  |  |

**Organisation Details**

|  |  |
| --- | --- |
| Organisation Name |  |
| Organisation Address |  |
| Organisation tel. no. |  |
| Organisation e mail address |  |
| Key contact tel. no. |  |
| Key contact name |  |
| Key contact e mail address |  |
| Company Registration or Charity number |  |
| Date of incorporation |  |

**Bank Account**

|  |  |
| --- | --- |
| Name of bank |  |
| Bank Address |  |
| Account name |  |
| Sort code |  |
| Bank account number |  |

**Financial information from latest accounts**

|  |  |
| --- | --- |
| Income/turnover |  |
| Expenditure |  |
| Reserves (sometimes split between restricted and unrestricted) |  |

**What areas/projects do you want for funding for?**

|  |  |
| --- | --- |
| What is your organisation’s vision or purpose? |  |
| What are the aims and objectives of your organisation (take from governance document)? |  |
| Brief background of your organisation/summary of what you do |  |
| How do your funding plans link to your business plans and priorities (the why)? |  |
| Projects – do you have the resources to manage, deliver and report? |  |
| What type of funding? | Project  Running costs – staff, rent, utilities etc  Capital costs – building, refurbishment, equipment |
| What types of fundraising do you want to do? |  |
| How much funding do I need? |  |

**Who do you want to help?**

**\***You may need to answer the next questions for each target audience/each project?

|  |  |
| --- | --- |
| Who are the people you help/support? |  |
| What are their barriers/ issues? |  |
| What are the problems you are wanting to solve? |  |
| How have you found this out? Consultation, talking to the people you support |  |

**What do you plan to do to address this problem?**

|  |  |
| --- | --- |
| How have you involved the people you are supporting in creating the solution/project? Talking to them, focus groups, survey |  |
| How are you going to solve the problem? |  |
| What are you going to do? |  |
| When? |  |
| Where? |  |

**Impact and evidence**

|  |  |
| --- | --- |
| Track record: What is the evidence of your impact to date? - Statistics and figures, case studies and quotes, visuals, stories |  |
| What difference do you want to make to peoples’ lives? Positive difference. |  |
| What is the planned impact of your project/work on your beneficiaries?  List the key outcomes. |  |
| How do you plan to monitor and measure these? |  |

**Policies and documents**

|  |  |
| --- | --- |
| Do you have a copy of your governance document? |  |
| Do you have a copy of your accounts/financial forecasts? |  |
| Do you have a bank account?  Need at least two signatories - unrelated/living at different addresses. |  |
| Is your governance in place?  Need at least three trustees/directors. At least two of these unrelated/living at different addresses. |  |
| Do you have the relevant policies and documents ready?  Key ones are Safeguarding and Equality & Diversity |  |
| DBS checks and updated Safeguarding training for your staff/volunteers/ trustees? |  |

**Collecting feedback/evidence**

|  |  |
| --- | --- |
| Quotes (with permission) |  |
| Photos/videos (with permission) |  |
| Stories/case studies (with permission) |  |
| Facts and figures |  |

**Contact details and further help**

If you want further help with your funding plans and implementation, please contact me:

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