

ARE YOU GETTING FIT FOR FUNDING?

To ensure your group is ready to apply for funding, there is a checklist below which you may find useful. This will be especially useful when you are new to funding or when you have a change of staffing or change of trustees. It's a simple checklist that is easy to use and will give you an idea of what funders expect to be in place prior to you applying for any funding. Funding is a very competitive field and you need to be as fit for funding as possible if you are going to compete:

Your Group Checklist

- Does your group have a constitution or set of rules?
- Are you registered with the relevant bodies (charity commission etc)?
- Does your group have a Management Committee/Board of Trustees?
- Does your Management Committee/ Board of Trustees have a Chairperson?
- Does your Management Committee/Board of Trustees have a Treasurer?
- Does your Management Committee /Board of Trustees have a Secretary?
- Does your group have a bank or building society account in its own name?
- Does the bank account have at least 3 signatories and do cheques need to be signed by at least two people who are unrelated to each other ?
- Does your group have a clear understanding of its aims and objectives?
- Is your group clear about the services it provides?
- Do you understand what it costs to deliver the various elements of your service?
- Do you know what resources your group has e.g. workers, volunteers, grants, office and equipment etc?
- Have your staff and volunteers got the training and experience to deliver the work for any funding you are requesting?
- Do you have any kind of quality mark or quality approval?
- Can you clearly demonstrate the difference your work makes to the service users?
- Have you got restricted funding separated from unrestricted funding?
- If you are an established organisation have you filed your annual returns in a timely manner (funders often check out the charity commission website before they read your application)?

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What kind of Group are you?

What legal structure does your group have? (You can be more than one of these for example CYA is a registered charity and a company limited by guarantee.)

- Unincorporated association (group, club, or society)?
- Registered Charity?
- Company Limited by Guarantee?
- CIC?
- CIO?
- Are you branch of a national organisation without your own constitution?
- Other?
- If needed is there an organisation who will accept money on your behalf?

About your group's policies and procedures...

- Do you keep minutes of all committee meetings?
- Do you have systems in place to record income and expenditure both restricted and unrestricted so you can report to funders and supporters?
- Do you have relevant policies e.g.
 - Health and safety?
 - Equal and Diversity
 - Safeguarding?
- If you have employees, do you have Employment Policies?
- Does your group have insurance to cover its legal responsibilities?

About your group's funding...

- Do you have a fundraising plan for the coming financial year or longer?
- Do you have a fundraising group? – that can be staff or trustees – its poor practice to be reliant on one person to undertake this as that is not sustainable
- Do you keep a records of your funding applications and any correspondence (good and bad with funders? So you can track who you have applied to and why you were not successful
- Does your group have an independent referee? That is somebody who might be required to talk to funders and assure them you are worth investing in
- Does your group identify a named person to act as a point of contact when submitting funding bids?
- Keep copies of all your funding applications for future use and in-case you are successful

What is restricted and unrestricted funding?

Restricted funding is given for a specific purpose – you have requested funding for Friday night activities or you have requested funding for a drugs workshop – if granted this funding is then restricted and can only be used for that purpose.

Unrestricted funding is when a funder gives you a contribution to your overall work (rare) but does not stipulate that it must be used for a set project or purchase of equipment.

WHAT CAN CUMBRIA YOUTH ALLIANCE DO TO HELP YOU GET FIT FOR FUNDING?

- Help to develop a sustainable fundraising plan
- Deliver customised workshops for your trustees and staff on how to undertake successful funding applications
- Organise training provided by high profile fundraisers
- Bring you together with funders to improve understanding about priorities and application processes
- Help to check bids prior to submission to the funders
- Help to provide statistics and information that may strengthen the bids
- Bring you together with other potential bidders so you can bid jointly and not duplicate the work of others
- Help you identify suitable potential funders – up to 20 funders identified for you 10 small and 10 larger if relevant
- Help by becoming a referee providing we have agreed to do so
- Help to set up financial systems to manage your grant once it has been received



Contact Juan to discuss what Cumbria Youth Alliance can offer you and book a workshop.

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