



Are You Funding Ready?

It is important that before you make a funding application you have a bank account in the organisations name and that this is managed by more than one person. You will also need to make sure that you have a governing document suitable for your type of organisation. It is also sensible to have some basic policies like your Health & Safety policy, a Safeguarding policy and an Equality & Diversity policy written and available. This will save a great deal of time and effort and will ensure a greater chance of a successful funding application.

For advice on how to set up your organisation and the essential steps you need to have in place before you even start to look at funding, please go to *Getting Set Up*.

Resource Library

Set up a document resource library in preparation for any information or additional documents that the funder will want to see or would be useful to include in your application. This library could include the following documents:

History

This should include any relevant history and the context in which the organisation operates. Avoid waffle and only impart the salient points that will support your application.

Aims

A clear Aim and Objectives statement. Also useful would be your Vision, Mission and Values statements.

Financial

Include your latest accounts and bank statement. Also useful would be details of your reserves policy and any income strategies that you may have.

Impact

Clear details on your intended impact and outcomes including targets and timelines.

Track record

Any details on the organisation's ability to delivery projects. Don't forget to include any relevant track record of staff and volunteers involved in delivery.

Policies

Particularly Health & Safety, Safeguarding, Equality and Diversity, Risk assessment. Do not forget Insurance details.

Legal

Appropriate licences or legal requirements.

Awards

This could include compliance with industry standards or awards for outstanding performance.

Other useful information could include:


- A description of your current activity or projects which could include Wishlist projects from your team.
- A description of your collaborations and your current partners.
- How you engage with all your different stakeholders, including how your beneficiaries are able to feedback to you.
- Who you can call upon to act as a referee for your organisation.

Need more support?

Wirral CVS is here to help your organisation grow, develop and succeed. Whether you're just starting out or strengthening your foundations, our Development Team can provide one-to-one guidance, training, resources and advice tailored to your needs.

Contact us to book a support session

 **Email:** info@wirralcvs.org.uk

 **Phone:** 0151 433 3371

 **Website:** www.wcvs.org.uk

More resources available at:

www.wcvs.org.uk/support

Including templates, guidance and policy tools across governance, finance, safeguarding, volunteering and more.

Disclaimer

www.wcvs.org.uk/support

This document is provided for general guidance only. It does not constitute legal advice. We recommend seeking professional support where required.

