

Overview

Before you start applying for grants, you need to make sure that you have the basics in place. Are you a well-run organisation? Do you manage your money well? Funders need to know that they can trust you with their money, and that your project is likely to succeed.

The following are some of the key areas that you need to think about:

Governing documents

The management of your group starts with your governing document, whether you are a voluntary group, a registered charity or a company limited by guarantee.

Is your constitution up to date and does it cover all your activities? If you are expanding, do your objects cover your new plans as well?

Returns

If you are a registered charity, or a company, are your annual returns to the Charity Commission and/or Companies House up to date? Remember that some funders do routine checks on the Charity Commission website.

Management

Does your committee know its legal responsibilities? Does it have the knowledge and skills it needs? If not, can you show that you know where the gaps are and that you are doing something about it?

This is particularly important if you are starting a major new project – for instance employing staff for the first time, or a big building project.

Policies

Do you have policies in place that cover the work you do? The sort of areas you might need to think about include: equal opportunities; health and safety; volunteering; working with children or vulnerable people and confidentiality.

Finances

Can you provide up-to-date annual accounts that give a clear picture of your financial position?

Have they been approved by your committee, and independently checked or audited?

Do you have systems in place to record all money coming in, and going out? Do you have checks and controls in place to avoid mistakes and to keep money safe? Are you running at a loss? Do you have lots of savings? If so, you may need to provide extra information to convince a funder that you are worth taking a risk on, or that you do need a grant.

Further information

Fit for funding

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Disclaimer

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

For further information contact

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