



# **Funding Toolkit**

**Are you ready to start applying for funding?  
Preparation and application**

# Getting ready

Funding makes sure your group or project can deliver, continue to deliver and improve on the services it provides. It can allow you to involve more people in your project, improve facilities and upgrade equipment or generally have the financial ability to do things your group wants to do. This includes:

- Planning a Funding Proposal
- Funding Checklist
- Amount of Funding You Need

# Planning a Funding Proposal

Plan well in advance as it can be a long process

- Don't start writing a funding proposal before you have done the necessary research, thinking and planning.
- Proposals should be discussed and approved by your management committee/Board of Directors/Trustees
- Give yourself time to plan and write the proposal before the closing date
- It can also take up to three months before you hear about the outcome of your funding proposal.
- Check with the funder about what information they require in the application.

# Funding Checklist

- Does your group have a management committee with at least three members?
- Is the management committee clear about their different roles and responsibilities?
- Does the group have a constitution that everyone agrees on?
- Does your constitution allow your group to apply for funding?
- Does the group have a bank account in its own name?
- Are there at least two signatories (people who can sign cheques) who are not related on the bank account?
- Do you have all policy documents in place prior to applying for funding i.e. Child Protection policy when working with children

# Funding Search Databases

Subscribe to free newsletters

Grants Online (subscription to use)

Grant Finder (subscription to use)

Funding Scotland (free to use)

Get Grants (free to use)

Grant Nav (free to use)

Funds Online (free to use)

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# Finding the right funding

**Important – don't waste your time applying to the wrong funder or fund.**

1. **Eligibility** - Check if your group is eligible i.e. does it fund charities, CIC's, un-constituted groups etc.
2. **Target groups** - Will the funder fund the groups you are working with?
3. **Outcomes** - Will your project meet the outcomes set by the funder?
4. **Timeframes** - When do applications have to be in by, when will you find out about the funders decision and does this fit with your timescale or needs?
5. **Personal contact** – If you can speak to the funder and talk through your project idea and check out anything that is not clear

# Talking to funder representatives

Speak to the funder to find out more information and check your project fits with their fund

**Important before you contact the funder make sure you have chosen the appropriate funder.**

- **Be professional** - Funders are represented by people such as the desk officer, project officer or regional chief executive. Communicate professionally with the funders representatives.
- **Discuss your funding proposal** - Be prepared to listen and share ideas, so that the funder is able to identify with people at a human level
- **Ask any questions you to ensure you are clear** – i.e. time of the deadline on the day of closure

# Before you start the application

Find out the format and prepare a draft for sharing and proof reading

- Does the funder have a template?
- Is it a letter?
- Is it an online application?
- If word version not available ask funder for one
- How many pages – stick to limit.
- Again prepare a draft in word



# What makes a good application

- **Be prepared**
- Your organisation's aims and objectives, annual accounts, bank details, constitution
- Organisation track record, policies and procedures
- **Be clear**
- Create a project brief which should include: WHO, WHAT, WHERE, HOW, WHEN
- Aims and objectives, activities, target audience, project duration
- Delivery staff, key volunteers, project partners
- The need the project addresses, the difference the project will make
- Project milestones
- Sustainability for when funding finishes
- Total costs – revenue and capital

# Who, How, What and When

Create a project brief which should include: WHO, WHAT, WHERE, HOW, WHEN

- **Why is your project needed or, what's the problem?**  
Facts and figures are important here and we can find the information needed to explain how your project fits in with local strategic plans, national policy and also look into any research which backs up your idea. What we need is detail of how this need affects your service users – what are the problems and barriers they face? Do you have any quotes or 'case studies' which demonstrate the need?
- **What difference will the project make?**  
Your project should provide a solution to the problem you have outlined above. Funders want to know what will change as a result of the project. Can you summarise this as an overall aim of the project? Do you have specific objectives or desired outcomes?
- **Who will benefit?**  
Think about the difference the project will make not only to your service users but also to staff and volunteers, to the way your organisation works. Then think about the local community, will they benefit? Will you share your learning with other organisations so they can benefit?
- **When and where will your project happen?**  
Funders want to know that you have given consideration to when and where your activities take place – they are seeking reassurance that you have properly planned the project. If you have chosen certain venues then they need to know why, if you project takes place in the evening because this is when most people are available then this needs to be clear as it demonstrates that the needs of the service users have informed the planning process.

# What makes a good application cont...

- **Evidence need**
  - Consultation reports, letters of support, case studies
  - Quotes from questionnaires, people you support
  - Demographic/statistical data, ward information, Government reports about your neighbourhood
- **Know your funder**
  - Make sure the project fits the criteria, always read the guidelines and check your group is eligible
  - Find out who they funded before and to what level
  - Make sure you are asking for eligible expenditure
  - Do you need to identify match funding?
- **Leave enough time**
  - Proof read and edit
  - Double check the budget

# What a funder will be looking for in your application

- A funder will need to be convinced that there is a need for what you plan to do, the group or groups of people that will benefit, and how many people will benefit
- They will want to know what will be done and what will be achieved
- They will need to be persuaded that supporting your project is likely to be successful and something they can claim to be involved with
- They will require an outline of the costs for each part of the project or activity showing how this has been worked out
- They will want to be sure you can handle money properly. You may need to provide them with a budget listing the cost of each item and how you plan to spend the budget

# Tips

- Long complicated sentences are difficult to read and understand. When filling in a funding application use **simple words and short sentences**
- **Be specific!** Picture the assessing officer in front of you as you type your application. This will help you think about exactly what you want to say. Cut out jargon.
- Before submitting...ask someone who knows very little about your project to read your application. See if they understand it?
- **Plan ahead.** Seeking and applying for funding takes time. Always check programme deadline dates and apply for funding well in advance.

# Tips

- Don't assume the funder has knowledge of your group or local area. What is obvious to you may not be obvious to the assessing officer.
- **Funders don't** need lots of details about your organisation. Provide specific answers about your project that relate to the questions asked.
- Find out if other projects/services in your area are working with the same groups. We want to know how your project will **fill gaps**.
- When applying – draw on knowledge from your group. Everyone that's been involved at the start are more likely to stick with the plan.

# Budgets

- Your budget is one of the most important parts of your funding proposal, so it's vital that it is accurate and realistic.
- Your organisation should have yearly budgets relating to its activities.
- It helps you make sure that you have the money for what you want to do.
- It allows you to make financial decisions and keep control of a specific set of figures rather than relying on guesswork about where you are.
- Ensure that any application is for full cost recovery i.e. full cost of the activity and check if you can include amount towards your core costs (usually as a %).

# Budgets

- Many funders divide budgets into capital & revenue costs.
- Capital costs: one off spending such as equipment, setting up costs or building cost.
  - Revenue costs are ongoing running costs: staff costs, rent, heating, lighting etc.
- Keep a note of how you arrived at your figures, so you can explain them if asked.
- Don't forget to include inflation on all costs if projecting for the year ahead (a general rule is 3% for salaries and 2% for other costs).
- Remember to consider where you will make up any shortfall. You could for example, get second hand IT equipment as your contribution(match funding) or use volunteer time as an 'in-kind' contribution (that is instead of making a cash payment).



# Funders will be looking for the following in your application

## Summary

- What you want to do
- How do you know it is needed
- How you will do it
- Who you will work with
- What the result will be
- How much it will cost
- What you will do when the grant runs out
- How you will keep track of your progress

# Funding application checklist

- ✓ Have you filled in all parts of the form?
- ✓ If any sections or boxes do not apply have you written 'Not applicable or N/A'?
- ✓ Are the names of committee members and contacts the same as those on your supporting document e.g. your account or constitution?
- ✓ Have you attached a copy of your constitution if required?
- ✓ Have you enclosed your latest yearly accounts or financial estimates for the following year, if required?
- ✓ Have you attached the budget and quotes or cost for your project?
- ✓ Remember to keep a copy of the completed application form for your reference, record the date the application was submitted.

# Engage Renfrewshire Training Courses

All courses are free to attend:

- Getting started with Trusts and Grants – 1.5 hours
- Online applications: The Myths and the Tips – 1 hour

To express interest email [info@engagerenfrewshire.com](mailto:info@engagerenfrewshire.com) or  
call 0141 887 7707

# Additional support

- Sandra Brown –Funding and Organisational Development Officer
- Invest in Renfrewshire (IIR) Communities Team

[info@engagerenfrewshire.com](mailto:info@engagerenfrewshire.com)

0141 887 7707

[Econdev.community@renfrewshire.gov.uk](mailto:Econdev.community@renfrewshire.gov.uk)