

Get ready!

What you need to do before you look for funding.

Sarah Moss, Community Action Bradford & District

Checklist 1 - is your group ready to apply for small grant funding?

	YES	NO	Unsure
Does your group have a constitution or a set of rules?			
Does your group have a management committee?			
Does your management committee have a Chair, Treasurer and Secretary?			
Does your group have a bank or building society account, in its own name, with at least 3 signatories?			
Do you keep minutes of all committee meetings?			
Do you have systems in place to record income and expenditure?			
Do you have relevant policies and/or insurance for the work you want to do? e.g. <ul style="list-style-type: none"> • Health and safety • Equal opportunities • Safeguarding • Employment 			

Need help?

The voluntary organisation support officer team can help with getting your group ready for funding, including writing a constitution, model policies and working with other local organisations. We work across Bradford district.

Bradford constituencies: Clive Whittaker clivew@cabad.org.uk 07964 352663 and Lincoln Oakley lincolno@cabad.org.uk 07422 575852.

Keighley constituency: Chris Barker chrisb@cabad.org.uk 01535 612500/ 07422 966140.

Shipley constituency: Sarah Moss sarahm@cabad.org.uk 01274 781222/ 07422 966142.

Checklist 2 - do you have all the information you need?

Having copies of the following documents, or knowing where to find them will really help when you're trying to meet a funding deadline.

These documents are often requested by funders but remember... **funders all have different requirements so always check each funder's guidance for what you need to send with your application.**

If you are currently responsible for fundraising, make sure someone else in the organisation also has a copy or knows where to find this information.

	Paper copy		Electronic copy	
	YES	NO	YES	NO
Your group's governing document (latest version signed when the trustees/ directors agreed it)				
Equal opportunities policy				
Health and safety policy				
Safeguarding policy				
Employment policies (if employing staff)				
Other relevant policies:				
Accounts or record of income and expenditure				
Insurance certificate				
Committee meeting minutes				

You will also find it useful to have the following when finding the right funder or filling in an application form:

- **List of the funders your organisation has applied to** and whether or not it was successful.
- **Evidence of need/ demand** e.g. questionnaires, research, waiting list.
- **Budget** – how much will the project cost and what items do you need?
- **Timescale** – when are you going to run the project? Work backwards to decide when you need to apply for a grant. Even small grants funders can take up to 3 months to make a decision – do you have enough time? Do you have other funding options i.e. sponsorship/ DIY fundraising/ donations/ using reserves?