

# A GUIDE TO A SUCCESSFUL BID

## Criteria, Criteria, Criteria

Every year groups apply to funding programmes without reading the criteria. The criteria sets out what the fund is trying to achieve - it's about attracting the right projects for our donors, things which interest them.

Make sure you don't fall at the first hurdle. Please read the criteria for the funding programme you decide to go for. If you're not sure your project fits then you can always contact the grants team on 01773 51850 who will be pleased to chat to you about your plans.

## On top of individual funding programme criteria, the Foundation has a few general exclusions/things we can't fund.

### These include:

- Profit making organisations / Businesses
- Medical Equipment
- Animal Charities
- Any project which promotes faith or involves the refurbishment / building of a place of worship
- Statutory Bodies - schools, hospitals, police etc
- Any project which directly replaces statutory obligations
- Projects which benefit people outside of Derbyshire
- Any project which promotes a political party
- Retrospective Funding (grants for activities which have already taken place)
- Sponsored Events

## How to complete the application form

Read each question carefully and answer as accurately and simply as possible. We are not looking for key phrases or the use of jargon but an easy to read overview, which explains your group, project and case for funding.

Here are our top 3 tips:

1

Once you have written the application form, pass it to a friend or colleague who knows nothing at all about your group or project. Did the application make sense to them? Did they ask you any questions? Their feedback may help you tweak the bid and make it easier for the grants team to understand.

2

Try and explain how you know there is a need for the project or tell us where the idea for the project came from. Did you carry out a pilot which was really successful? - if so tell us about this. Maybe members have been asking for this project / item for some time. Again tell us about the feedback you have received.

If you are applying for a piece of equipment or refurbishment work tell us about the state of your existing items / rooms, etc. What difference will new equipment / refurbishment make?

If you are applying for general running costs it might be that you need to tell us why you are struggling to meet your day to day expenditure. Have some of your costs increased i.e. transport? Has your membership declined leading to less income?

Have you always been reliant on grant funding?

# 3

Always give as much detail as you can in the budget section, for example: rather than stating equipment = £500, break this down and tell us exactly what you will be purchasing, i.e. pool table = £250, goal posts = £75, etc.

The decision making panels and donors like to know budgets and projects have been well planned out and that figures have not been pulled out of thin air!

## Supporting Documents

Alongside your application form we'll ask your group to send in some other documents, which will support your request for funds. These documents are given in a check list at the back of the application form. We also describe them below and explain why we ask for them and what we are looking for. All documents are only for internal use.

### Constitution:

This states what your group does, how you manage the group, including electing members, how you take care of your finances and what you would do if your group was to fold. It also often clarifies that you are a not for profit organisation. It is an important document for us as it tells us how you work and what you are about. It lets us know you have processes in place to manage things and that you would be able as a committee to handle a grant.

*Other names for a constitution: Memorandum & Articles of Association, Trust Deed, Club Rules.*

### Management committee list:

The template for this can be found on the How to Apply page under the resources section. By filling in this list we can see at a glance who is involved in the running of the group, we can look to see if there are an adequate number of people involved and we can make checks with regards to members from the same family and those living at the same address.

### Annual Accounts / Balance Sheet:

If your group is over a year old you should have some form of accounts or balance sheet. This is usually prepared by the group's treasurer and presented at the group's AGM. This tells us about income and expenditure over a 12 month period. It should contain a brought forward figure from the previous year and a carry forward figure into the new year (how much you have left). This allows us to calculate how much you have in the way of free available money or in other terms how strong your financial need is.

### ORIGINAL Bank Statements:

Preferably 3 months worth of recent statements or 5 bank pages, which ever is the least amount of paper. These are photocopied in house and sent straight back to you. If you have problems acquiring originals or the treasurer is reluctant to post them, contact us to discuss alternative options. We need the information for making a payment if you are successful.

### Management Committee Minutes:

If your group has not applied to the Foundation before or if your group is under 12 months old we will ask for a copy of some recent minutes. This is so we can see the committee are actually meeting. We tend to find problems arise when there is a lack of communication.

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