**Cumbria Youth Alliance**

**Are you getting fit for funding in 2018?**



To ensure your group is ready to apply for funding, there is a checklist below which you may find useful. This will be especially useful when you are new to funding or when you have a change of staffing or change of trustees. It’s a simple checklist that is easy to use and will give you an idea of what funders expect to be in place prior to you applying for any funding. Funding is a very competitive field and you need to be as fit for funding as possible if you are going to compete:

**Your Group: Checklist**

1. Does your group have a constitution or set of rules?
2. Are you registered with the relevant bodies (charity commission etc)?
3. Does your group have a Management Committee/Board of Trustees?
4. Does your Management Committee/ Board of Trustees have a Chairperson?
5. Does your Management Committee/Board of Trustees have a Treasurer?
6. Does your Management Committee /Board of Trustees have a Secretary?
7. Does your group have a bank or building society account in its own name?
8. Does the bank account have at least 3 signatories and do cheques need to be signed by at least two people who are unrelated to each other ?
9. Does your group have a clear understanding of its aims and objectives?
10. Is your group clear about the services it provides?
11. Do you understand what it costs to deliver the various elements of your service?
12. Do you know what resources your group has e.g.workers,volunteers, grants, office and equipment etc?
13. Have your staff and volunteers got the training and experience to deliver the work for any funding you are requesting 22-Jan-18?
14. Do you have any kind of quality mark or quality approval?
15. Can you clearly demonstrate the difference your work makes to the service users?
16. Have you got restricted funding separated from unrestricted funding?
17. If you are an established organisation have you filed your annual returns in a timely manner (funders often check out the charity commission website before they read your application)?

**What kind of Group are you?**

**What legal structure does your group have? (You can be more than one of these) for example we are a registered charity and a company limited by guarantee**

* Unincorporated association (group, club, or society)?
* Registered Charity?
* Company Limited by Guarantee?
* CIC?
* CIO?
* Are you branch of a national organisation without your own constitution?
* Other?
* If needed is there an organisation who will accept money on your behalf?

**About your group's policies and procedures ...**

1. Do you keep minutes of all committee meetings?
2. Do you have systems in place to record income and expenditure both restricted and unrestricted so you can report to funders and supporters?
3. Do you have relevant policies e.g.
   * Health and safety?
   * Equal and Diversity
   * Safeguarding?
4. If you have employees, do you have Employment Policies?
5. Does your group have insurance to cover its legal responsibilities?

**About your group's funding ...**

* Do you have a fundraising plan for the coming financial year or longer?
* Do you have a fundraising group? - that can be staff or trustees - its poor practice to be reliant on one person to undertake this as that is not sustainable
* Do you keep a records of your funding applications and any correspondence (good and bad with funders? So you can track who you have applied to and why you were not successful
* Does your group have an independent referee? That is somebody who might be required to talk to funders and assure them you are worth investing in
* Does your group identify a named person to act as a point of contact when submitting funding bids?
* Keep copies of all your funding applications for future use and in-case you are successful

What is restricted funding?

1. Restricted funding is given for a specific purpose - you have requested funding for Friday night activities or you have requested funding for a drugs workshop - if granted this funding is then restricted and can only be used for that purpose

What is unrestricted funding?

1. Unrestricted funding is when a funder gives you a contribution to your overall work

(rare) but does not stipulate that it must be used for a set project or purchase of equipment

**What can Cumbria Youth Alliance do to help you get fit for funding ?**

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* **Help to develop a sustainable fundraising plan**
* **Deliver customised workshops for your trustees and staff on how to undertake successful funding applications**
* **Organise training provided by high profile fundraisers**
* **Bring you together with funders to improve understanding about priorities and application processes**
* **Help to check bids prior to submission to the funders**
* **Help to provide statistics and information that may strengthen the bids**
* **Bring you together with other potential bidders so you can bid jointly and not duplicate the work of others**
* **Help you identify suitable potential funders - up to 20 funders identified for you 10 small and 10 larger if relevant**
* **Help by becoming a referee providing we have agreed to do so**
* **Help to set up financial systems to manage your grant once it has been received**

**Want to book your help now ....what do you have to lose???**

**Contact** [**Cath@cya.org.uk**](mailto:Cath@cya.org.uk) **or** [**Juan@cya.org.uk**](mailto:Juan@cya.org.uk) **to discuss this further or to book your free workshop. Both Cath and Juan are experienced fundraisers and are Members of the Institute of Fundraising**

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