



Foundation
Derbyshire



A Guide

To A Successful Bid.

January 2023.



Criteria, Criteria, Criteria.

Every year, groups apply to funders without reading the criteria. The criteria sets out what the funder is trying to achieve; it's about attracting the right projects for our donors and things which interest or concern them.

Make sure you don't fall at the first hurdle. Please read our main criteria below. If you're not sure that your project fits, then you can always contact the grants team on 01773 525860 and they will be pleased to chat to you about your plans.

The Foundation has several general exclusions/things we can't fund. These include:

- Profit making organisations / Businesses / Sole Traders
- 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 Derbyshire
- Any project which promotes a political party
- Retrospective Funding (grants for activities which have already taken place)
- Sponsored Events – events raising funds for further distribution
- Groups who have an active grant with us, or who have had a grant within the last 12 months.
- Groups who have not completed monitoring from a previous grant
- Whilst not 'ineligible', if you have a large-scale project exceeding £10,000 in total, please call the grant team first to ensure we can support you and to look at how to structure your budget.



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 tips ...

One.

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.

Two.

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 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, e.g. transport? Has your membership declined leading to less income?

Have you always been reliant on grant funding?



Three.

Always give as much detail as you can in the budget section. For example, rather than stating equipment = £ 500, break it down and tell us exactly what you will be purchasing (e.g. 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!

Four.

'Personal' works, so provide us with real stories of how your project has made a difference to local lives – consider quotes and feedback direct from those you support.



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 how you elect 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 are able, as a committee, to handle a grant.

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

Management committee list & Financial Controls.

This form will be provided to you by the grants team, but you can also [download it here](#). By filling in this list we can see immediately who is involved in the running of the group and how you manage your money. It is important to include home addresses. If you have any questions or concerns do not hesitate to contact us.

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. If you are under a year old we can provide you with a predicted income and expenditure sheet. It's important for us to understand what income and expenditure has taken place to date and what you expect to happen for the remainder of that first year.

Bank Statements

You can send in scanned copies or copies in the post. But preferably we require 3 months' worth of recent statements. If, however, 3 months equates to a high number of pages, please send in the last 5 sheets.

We need the information for making a payment if you are successful and to check that bank accounts are in place and are being used legitimately and appropriately.

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 that the committee are meeting. We tend to find problems arise when there is a lack of communication within a group.

Further information on why we ask for certain supporting documents and how we use them can be found in [GDPR and Supporting Documents – A Guide](#).



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