

This template will help you to identify if a project is suitable for fundraising. The template takes you through a series of questions which will help you identify your strengths and where you need to do more preparation before fundraising. Your answers can then be used to help you write an application or proposal to a funder. This template comes from our Trust & Foundation Bid Writing (Retained) service.

| | |
|--|--------------------------------------|
| Organisation | |
| Project Name/Core | |
| Date project sheet tool completed | |
| Date of next sheet update | |
| Type of project (delete as appropriate) | Core/Unrestricted/Small/Large |
| New or existing project? | |
| Why is this work valuable? | |

Evidence of Need/Why are you doing this? (Justification)

This is where you can include quantitative and qualitative data such as census data, your own survey results, reports, etc. to show the need (e.g. disadvantage, deprivation, environmental studies).

State the urgency.

Who will benefit directly and/or indirectly from the project?
How many?

Age, gender, geography etc...

How do you they want this?

Who have you spoken with and what they have told you?

This is a common question from funders that want to see activity isn't 'done to people' but with people.

Overall aim(s). What does the project hope to achieve?

(Scope of the project - definition)

SMART Objectives

Outputs of the project:

Clearly explain what the project will deliver.

What is the project timescale?

| Delivery Timetable (Phase and time) Headings changeable | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 |
|--|------------------|------------------|------------------|------------------|
| Advertise | | | | |
| Recruit | | | | |
| Marketing & Launch | | | | |
| Evaluate | | | | |

Capital project only:

| | |
|---|--|
| Has a feasibility study taken place? | Y/N A feasibility study needs to have happened before funding is applied for. |
| Any plans required - planning permission etc...? | |
| Timescales | |

Defined roles and responsibilities for those involved.

Number of FTEs.
Existing or new?
Staff / Volunteers?

List any partners and how you are working together.

Any requirements?

Outcomes of the project:

When the output is used, it generates changes, and these are the outcomes.

What difference will this project make to the participants?

Short-term and long-term impacts.

Increasingly funders are wanting to see the impact you bring.

What does success look like at the end of the project?

Monitoring and Evaluation methods:

How will you evidence your impact?

People and processes. Keeping track of spend against budget. Reporting.

Case studies / testimonials
Please attach

Image
Please attach

Why are you the best organisation to be delivering this work?

Expertise, Reputation, Track Record. Social value if available.

What makes your approach different?

How will people know about the project?

Communication plan.

Risks and mitigation:

Is there a risk assessment?

Funding:

Income and Expenditure Budget:
Please attach

Does this show a clear gap in the budget that a funder could potentially fill?

How much do you need as a proportion to the whole?

List other funders, amounts and timetables to spend.

Post Project plans:

Wrap up? Continue?



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Get in touch via our website <https://mmcltd.co.uk/enquiries>

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