HOW TO MAKE AN APPLICATION
A Simple Guide

We appreciate the time and energy that charities devote to fundraising. This guide is to help you make the best possible case to us and possibly to other Trusts and Foundations.

Completing the application need not be complicated. It is basically an opportunity for you to tell us the story and facts about your organisation.

- Who you are and what your organisation does;
- The need you are addressing;
- The number of people who will benefit;
- How and when the work or projects will be delivered;
- How much it will cost;
- What the on-going impact of the project will be;
- How success is measured.

Think about what the reader of your application needs. Within the application we need to understand the key points about your organisation/project, the project costs, benefits and delivery plan.

The more concise you can keep the information the better – this then uses both your and our time most effectively. It may help to ask someone who does not know your organisation to read a draft and see if it makes sense to them.

In terms of what to apply for, it could not be simpler – what is your charity's most pressing need and priority? The Trust's aim is to be responsive to need, therefore if you can tell us why your project is important and why it is your key need, our Trustees will be delighted to consider it. Is it to raise funds towards core costs; a specific service/project or for a capital project?

Completing the Application on line (www.wwmt.org)

Listed below are the sections/questions in our application form, together with the type of information we require for each. All applications must be submitted via the website www.wwmt.org.

1. Charity Information

Please provide your charity name, number and contact details in the relevant areas in the application. Please also complete the Annual Income for the last 3 years and Annual Income from Fundraising for the same period.

2. Summary of What Your Charity Does

Ensure that we understand all about you and your charity – this will ensure that the rest of your application makes sense. Summarise what your charity does, and crucially, what makes it unique. What services your charity delivers and the need you are addressing.

Please try to limit this to 200 words, if possible.

3. Summary of the Specific Project

Describe briefly an overview of the project that you are seeking funds for;

- Impact
- What will be the impact of your project? What
  difference will it make and how?
- How many people will benefit from the project? If relevant, you may want to include numbers of volunteers you engage with in addition to direct beneficiaries.

Timescales
- When will the project/work you are seeking funds for start?
- How long will it run for?
- If you are applying for core costs, please be clear as to which financial/operational year your application refers to.
- When do funds need to be secured? Do you need a certain proportion of the funds to be in place before work/the project can start?

Please try to limit this to 200 words, if possible.

4. A Clear Explanation of Desired Outcomes and How these will be monitored throughout

Provide a number of Key Performance Indicators (KPIs), which if successful, would be agreed with the Trustee and used as a measure during the grant reporting process. For example;

- How will the project/work be delivered?
- Who within your organisation will be responsible for this?
- What will be different and/or improved as a result of your work and what are the assumptions on which this is based?
- How many people will benefit from your work?
- What will success look like?

There are many ways to evaluate the need for a project; indicators may include the level of local commitment to the project evidenced by elements such as fundraising activity, volunteer engagement, local authority support, number of beneficiaries etc. Are you the only organisation dealing with an issue or delivering a service in the area?

Questions 6, 7 and 8

You may have provided information relating to these questions within one of the previous sections, however, please try to provide further details, if possible.

9. Breakdown of your Budget

Project Budget

This is vital, so please ensure that you include all the relevant information and that it is set out as clearly and succinctly as possible.

- Provide a breakdown of the project budget for the main costs involved and any assumptions these are based on. The main costs may include elements such as staffing, materials, overheads etc.
- Remember to check the amounts add up and that you include the total cost of the project.

Operational Budget

If you are raising funds (we do not usually support capital projects) for a pilot project, please include a section as to how the on-going revenue costs will be met and the assumptions on which they are based. For example, if you are raising funds for a new children's activity centre, please include income projections and their sources.

We do contribute to core costs. Please include a very clear expenditure budget.

Your Organisation's Finances

We need to understand where your money comes from and what you spend it on. You will need to send us a copy of your latest audited accounts (or whatever is relevant to your particular organisation). If there is anything particular within your accounts that you feel needs explaining, please do so within your application. This is particularly useful in helping us to understand any loans your charity may have in place or any funds that are classified as 'unrestricted' but are in practice 'designated'. Other examples may be that you have merged with another charity and therefore your last accounts show an inflated expenditure of reserve, or you may have received a one-off legacy.

Along with a range of other considerations, our Trustees review applications in light of the financial health of the organisation, including costs incurred (i.e. administration and fundraising) in relation to expenditure on meeting charitable objectives.

We also look at the financial viability of your organisation – charities that are relatively stable financially, tend to be in a better position to run effectively and deliver a high quality of services. Our Trustees therefore look for signs that your organisation is able to keep running, including past history, an appropriate level of reserves, a mixed funding base (possibly including individual and corporate giving), statutory and local council funding and local council funding and local support where relevant.

It is helpful if you can provide the above information in an easy to read format such as a table (see below example). Use headings relevant to your charity.

Project Requirements	Year 1	Year 2	Year 3
Fixed Costs	£1,000	£1,000	£1,000
Running Costs	£15,000	£17,500	£19,000
Overhead Costs	£5,000	£6,000	£6,500
Total Project Budget	**£21,000**	**£24,500**	**£26,500**
Expected Income	£2,000	£4,500	£7,000
Funds Already Received / Own Reserves	£9,000	£10,500	£11,500
Current Shortfall Required from WWMT	**£10,000**	**£9,500**	**£8,000**

Backup Plan

Hopefully your fundraising will be successful, however we are aware that raising funds is hard work and especially in the current economic climate. What will happen if the funds cannot be raised? Will the work go ahead albeit on a reduced level? What are the implications of the work not going ahead?

10. Who Else Have You Applied To

- How are you planning on funding the work?
- Is your organisation committing any of its own resources?
- Do you have targets for various funding sources e.g. individual giving, Trusts, companies etc?
- If your services are paid for, include a projection for earned income.
- What funds are already in place, and where from (e.g. specific Trust, local council etc).
- What other pending or planned applications do you have in place?
- If you have a matched-fund in place, please provide details and any conditions that it comes with.

11. Contact Details of 2 References / Letters of Support

We do contact Referees prior to approving a grant, and therefore request details of 2 referees.

It is interesting to know who else is supportive of your work. You may want to include examples of previous funders, charities, or companies you work in partnership with or any other organisations that have shown recognition of the value of your work. We request that all grant recipients provide us with a copy of their logo which permission is given to be used on our social media/website.

Additional Information for Consideration

These are not essential to your application, but may assist the Trustees in understanding more about your charity.

The People in Your Charity
It can be helpful to provide a brief biography of the Directors / Trustees so we can understand who is behind the running of the charity.

Case Studies
It can really help the Trustees fully understand the purpose of the charity/project if you can include one or two case studies or quotes from people who have benefitted from your work. Photos are always an excellent visual aid, so please feel free to include these if appropriate.

And finally….

Please check you have included all of the following with your application before sending it to us;

- Covering letter signed by an authorised representative of your organisation.
- Details of Referees or copies of letters of support.
- Copy of the most recent report and audited accounts (charities required to submit their report and accounts or an Annual Information Return to the Charity Commission should also provide confirmation that this has been completed).

Good Luck – we wish you all the very best for your fundraising and your continuing work.