

Preparation Worksheet

Organisation Checklist

To ensure your group is fit for funding, please tick the relevant boxes. Also indicate any actions you may need to take, who would deal with them and when.

About your group

	Yes	No	Action Required
Does your group have a constitution or set of rules?			
Does your group have a Management Committee?			
Does your Management Committee have a Chair?			
Does your Management Committee have a Treasurer?			
Does your Management Committee have a Secretary?			
Does your group have a bank or building society account, in its own name, with at least 3 signatories?			
Does your group have a clear understanding of its aims and objectives?			
Is your group clear about the services it provides?			
Do you know what resources your group has e.g. workers, volunteers, grants, office and equipment etc?			

What kind of Group Are you?

Which legal structure does your group have?
(You can be more than one of these)

	Yes	No	Action Required
Unincorporated association (group, club, or society)?			
Registered Charity?			
Company Limited by Guarantee?			
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?			

Preparation Worksheet

Organisation Checklist

About your groups policies and procedures:

	Yes	No	Action Required
Do you keep minutes of all committee meetings?			
Do you have systems in place to record income and expenditure?			
Do you have relevant policies e.g. : • Health and safety? • Equal opportunities? • Child protection?			
If you have employees, do you have Employment Policies?			
Does your group have insurance to cover its legal responsibilities?			

About your group's funding:

	Yes	No	Action Required
Do you have a fundraising plan?			
Do you have a fundraising group?			
Do you keep a records of your funding applications and any correspondence (good or bad) with funders?			
Does your group have an independent referee?			
Does your group identify a named person to act as a point of contact when submitting a funding bids?			