Cabinet Office

Cabinet Office
Small Charities Fundraising Training Programme 2015/16

GUIDANCE NOTES

About Cabinet Office

We support the Prime Minister and ensure the effective running of Government. We are also the corporate headquarters for Government, in partnership with HM Treasury, and we take the lead in certain policy areas. Among others we have responsibility for encouraging and enabling social action.

About these Notes

Read these notes carefully before you fill in your application form. But make sure that you keep them - if we like your proposed project we may invite you to an interview.

This information was published in September 2015.

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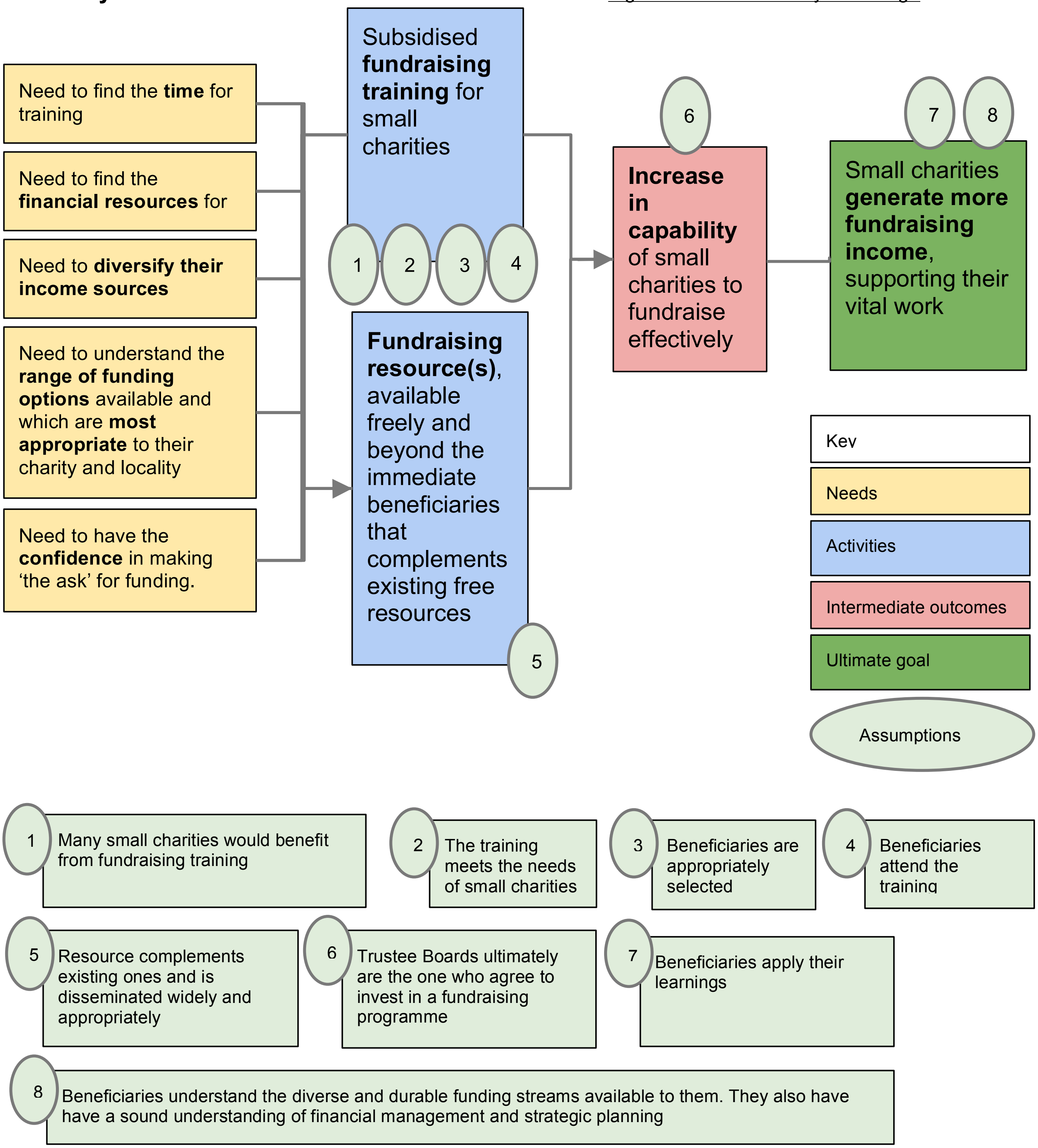
PART ONE Overview of the programme

Summary

Figure 1: SCFTP Theory of Change



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What are we looking for?

The Government recognises that some small charities may find it challenging to maximise their fundraising revenue and understand the fundraising options available to them. The Office for Civil Society will therefore select between one and three partners to deliver subsidised fundraising training to small charities. The target group are small charities with an annual income of up to £1 million. We hope that this will enable small charities to generate more fundraising income, supporting their vital work and help to ensure a confident, capable and thriving civil society.

We are looking to select between one and three partners who will deliver the following to increase the capability of small charities to fundraise effectively, allowing them to generate more fundraising income:

- subsidised fundraising training to small charities, whereby small charities pay only a small fee;
- a fundraising resource(s), available freely and beyond the immediate beneficiaries (i.e. the charities that attend the training), that complements existing free resources.

Who can apply?

You can apply if you believe you have the fundraising expertise and capacity to deliver fundraising training between mid February and June 2016.

Applicants should note that a previous OCS programme of £100k delivered 706 training opportunities to over 300 small charities.

You can apply to this Small Charities Fundraising Training Programme if you are:

- a legally constituted Civil Society Organisation (this could be a company limited by guarantee, or CIC for example) which may, or may not, also have charitable status.
- a business with a social mission or clear objectives in its corporate social responsibility policy toward increasing social action.

How much is available?

The programme will have a total value worth up to £100,000. The money is being provided by the Cabinet Office's Office for Civil Society (OCS).

You can ask us for a grant between £25,000 and £100,000 for projects running between mid February and June 2016.

We will fund mainly revenue costs. Capital costs must not exceed £5,000. We can fund projects of a range of sizes.

The application process

The application process has four stages:

1. You need to complete the application form where you tell us about the project you would like funding for, how you will run it and what difference it would make.

2. We will use the information that you give us in your application form to make a firm decision about whether your project is eligible or not. We will then evaluate projects that meet all the eligibility criteria.

3. We will invite shortlisted candidates to an interview.

4. We will then make a firm decision on whether we will fund your proposed project.

Timescales

Applications must be received no later than Friday, 9th October, noon, and you must be confident of your ability to set up and deliver your project so that is fully operational by mid February 2016 at the latest. A full timeline is set out below. Please note that the timescales could be subject to change.

Timeline	
25 Sep. 2015	Applications for programme open
by 1 Oct. 2015	Any questions by potential applicants submitted
by 6 Oct. 2015	Answers to questions by potential applicants published
9 Oct. 2015, noon	Deadline for applications
22 and 23 Oct. 2015	Interviews for shortlisted applicants
end of Oct. 2015	Notification of successful applicant/applicants

end of Oct. - Dec. 2015	Due diligence
Dec. 2015	Announcement of successful applicant/applicants
Dec. 2015	First grant payment
Dec. 2015 - mid Feb. 2016	Project set-up and evaluation
Feb. - Mar. 2016	Project delivery and evaluation
Feb. 2016	Second grant payment
Mar. 2016	Third and final grant payment; all spending needs to be committed by 31st March and spent by 30th June 2016
Apr. - Jun. 2016	Project delivery and evaluation
30 Jun. 2016	Deadline for all spend of grant
30 Sep. 2016	Final impact evaluation report

Before you apply

Please ensure you read the guidance notes and complete each of the sections prior to submission. Incomplete applications will not be considered.

Contact us on socialaction@cabinetoffice.gov.uk if you have any questions by 1st October. Please note that after that date, we may not be able to answer your queries. We will publish the answers to questions we received by 1st October by potential applicants by 6th October 2015.

How to apply

Save: Once you are ready to submit the form, ensure that you save the final version. Keep a printed copy if you prefer.

Collate: Ensure your form is complete and that you have got all the required supporting documents at hand.

Send: Forms must be emailed to socialaction@cabinetoffice.gov.uk along with your supporting documents (if required).

Confirmation: Expect an automated reply from us once you have sent us your application.

PART TWO Who should our funding help?

What difference are we trying to make?

The Small Charities Fundraising Training Programme targets small charities with an annual income of up to £1 million.

The programme has the intermediate outcome as listed in our Theory of Change shown in Figure 1: an increase in the capability of small charities to fundraise effectively. We use the word intermediate outcome to describe the intermediate changes or differences we want our funding to make.

The ultimate goal of this programme is for small charities to generate more fundraising income, supporting their vital work. By ultimate goal we mean the key change or difference we want our funding to make.

Every project we fund must help achieve that intermediate outcome and must contribute to achieve the ultimate goal of our programme.

A Theory of Change shows the path from needs to activities to outcomes to impact. It describes the change we want to make and the steps involved in making that change happen. Theories of change also depict the assumptions that lie behind a reasoning, and where possible, these assumptions are backed up by evidence. Theories of change are often shown in a diagram, allowing to see the causal links between all the steps.

If you apply for funding, we will ask you to provide details of your own project's intermediate outcomes that link to the intermediate outcome of the Small Charities Fundraising Programme. Part of our decision to award you a grant is based on our assessment of the quality of the intermediate outcomes of your project which must:

- help to achieve the ultimate goal of the programme;
- be ambitious in the impact they will have on your beneficiaries;
- be realistic and achievable by the end of your project.

We will ask you to set indicators for each intermediate outcome. Indicators are signs that the change or difference is happening and they help you to see whether your project is being effective. If your application is successful, you will use these indicators to measure and track your progress towards achieving your intermediate outcomes and the ultimate goal.

PART THREE Who can apply?

You can apply to this Small Charities Fundraising Training Programme if you are:

- a legally constituted Civil Society Organisation (this could be a company limited by guarantee, or CIC for example) which may, or may not, also have charitable status.
- a business with a social mission or clear objectives in its corporate social responsibility policy toward increasing social action.

Under this programme we will not normally make grants to organisations that:

- are applying on behalf of other organisations and are not the lead organisation of a proposed partnership
- are in poor financial health.
- have demonstrated poor management of grants from us in the past.

You can apply if you believe you have the fundraising expertise and capacity to deliver fundraising training between mid February and June 2016.

Applicants should note that a previous OCS programme of £100k delivered 706 training opportunities to over 300 small charities.

England programme

The Small Charities Fundraising Training Programme is an Office for Civil Society (OCS) programme. OCS funds activities which directly or indirectly benefit the whole or part of England (whether or not they also benefit any other area). OCS cannot fund projects that are purely beneficial to those outside England.

Partnerships

Organisations can apply in partnership but it is not a requirement. If you are applying in partnership, only the lead organisation can submit an application.

Working together can help to enhance existing provision, and brings different sets of skills together to provide improved networks of services for beneficiaries. If you are working in partnership with other organisations, you should ensure that the divisions of responsibility and how you will manage your relationship with them are set out clearly in your application.

PART FOUR How much money is available and for what?

We will make grants between £25,000 and £100,000 to a total of £100,000 for the financial year April 2015 to March 2016. Capital costs such as equipment must not exceed the value of £5,000. We may support projects of a range of different sizes. We anticipate funding between one and three projects. All funding has to be committed by 31st March 2016 and be spent by 30th June 2016.

What will we pay for?

We can pay for your project's revenue and capital costs, subject to below.

Revenue costs include training, salaries, travel, running costs, venue hire and volunteer expenses. As regards salaries for staff, we will assess on a case by case basis whether these would be eligible for funding. It is likely that the delivery of the service will involve paid staff in some capacity. Applicants need to demonstrate very clearly in their application how the resource they are bidding for supports the programme. We will only fund salaries for staff involved in the delivery of the project, and the main delivery mechanism of the project should be fundraising training. We anticipate that the types of salaries we would fund include roles focused on the training delivery, although we won't limit our funding to this.

Capital costs include buying equipment, vehicles, constructing a building or altering a building. Capital items are fixed assets with a useful economic life of more than a year. Capital costs must not exceed £5,000.

Match funding

You cannot use a Small Charities Fundraising Training Programme grant as a partnership or match funding for grants from our other Office for Civil Society funding programmes.

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PART FIVE What is the application process?

Process and timetable

We open the programme for applications on 25th September.

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We will publish the answers to questions we received by 1st October by potential applicants by 6th October 2015.

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You send us your application form and any other information we ask for by 9th October 2015, noon.

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We will invite shortlisted applicants to interview by 19th October.

↓

If you are a shortlisted applicant, you attend the interview on 22nd or 23rd October 2015.

↓

If you are successful at the interview, we will notify you in November 2015.

↓

If you are awarded a grant, you must accept the grant contract by December and start mobilising your project by December 2015.

If your application was not successful, we will notify you by December 2015.

What we will do.

What you must do.

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How do we assess your application?

Proposals will be assessed by a panel. Please assume that assessors have no background knowledge of your organisation, its aims and what it does. It is therefore important that your application is as clear, concise and unambiguous as possible.

Initial sift

We will review your application to check that the information in the body of the application meets the eligibility checklist.

Evaluation of eligible bids

We will then score eligible bids in line with our key criteria.

The table below sets out what we are looking for, the weighting in the bid evaluation, and the questions we will use to make our assessment.

Successful bidders will...	**Weighting**	**Questions**
build on or adapt an existing fundraising training project.	15%	Q1, Q2
have a convincing argument for why the project is likely to have the impact we are looking for.	35%	Q3 - Q6
be able and willing to measure the impact of their project.	20%	Q7, Q8
have the capacity to deliver at pace with good value for money.	30%	Q9 - Q16

Shortlisted applicants will be interviewed on 22 or 23 October. The interview panel may include an external party/external parties. You must be available for an interview then if you are shortlisted.

Moderation

Finally, we will decide the set of projects we would like to fund. At this stage, we take into account the overall score, the interview and the extent to which the set of bids create a well-rounded programme.

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PART SIX Application form guidance

This section provides further detail on each question in the application form. If you have a question that is not covered below, please email socialaction@cabinetoffice.gov.uk by 1st October. Please note that after that date, we may not be able to answer your queries. We will publish the answers to questions we received by 1st October by potential applicants by 6th October 2015.

Eligibility checklist

If you answer **NO** to any of these questions, **except on state aid**, then your application will not be eligible.

My organisation is one of the following: Answer Y/N

- ***a legally constituted Civil Society Organisation (this could be a company limited by guarantee, or CIC for example) which may, or may not, also have charitable status.***
- ***a business with a social mission or clear objectives in its corporate social responsibility policy toward increasing social action.***

Your organisation must be one of the above.

The benefits of my project focus on England. Answer Y/N
Your proposal must focus on England because the programme is financed by the Cabinet Office's Office for Civil Society.

My project builds on or adapts an existing service. Answer Y/N
We are interested in funding projects that build on or adapt existing services.

My project will benefit small charities with annual income of up to £1 million. Answer Y/N
Your proposal must focus on small charities with annual income of up to £1 million only.

Fundraising training is core to the service I am proposing. Answer Y/N
We are interested in projects that have fundraising training at the core of the service they offer. Examples of training could include: short professional fundraising courses, intensive one-to-one coaching sessions, live online surgeries/webinars. Examples of topics covered could include: fundraising standards and ethics, raising funds from trusts and foundations, from major donors, via online fundraising, through corporate fundraising, through appeals and campaigns, from communities and events, via

legacies, tax effective giving, bidding for statutory funds and contracts, developing a fundraising plan, building an effective case for support, working with your trustee board, fundraising and investment strategy.

My project proposes a fundraising resource(s), available freely and beyond the immediate beneficiaries (i.e. the charities that attend the training), that complements existing free resources. Answer Y/N

We are interested in fundraising training ideas that have an impact beyond the immediate beneficiaries, i.e. charities that attend the training, and that complement already existing, freely available resources to help fundraise effectively.

The money I am applying for will be used primarily to fund revenue costs, and the total expenditure on capital items for this project will not exceed the value of £5,000. Answer Y/N

Eligible activities would normally incur costs over a variety of items, which could include staff travel and project lead supervision costs. Capital items are fixed assets with a useful economic life of more than one year, which could include IT and office equipment.

My organisation would have financial control over any grant that I was awarded rather than any other organisation. *Answer Y/N*

We will only fund projects by organisation(s) who have financial control over the grant that they have been awarded. If you are applying as a partnership, only the lead organisation can submit an application which will also need to be responsible for managing the grant and demonstrate that appropriate arrangements are in place for the oversight of any funds paid on to other members of the partnership.

The organisation(s) submitting this proposal are in a position to accept a grant offer by December 2015 and spend this by the end of June 2016. *Answer Y/N*

You must be able to spend the full grant you are awarded by June 2016. Evidence of spend will be required.

I consider that this proposal complies with state aid guidelines. Answer Y/N

State aid rules are intended to support the internal European market by ensuring that aid from a member state does not distort competition and affect intra-community trade. Grants made by, or on behalf of, OCS are very likely to be state aid unless you cannot be classed as an undertaking. An undertaking is an entity engaged in economic activity- i.e. it offers goods or services on a given market. A functional approach is taken, so charities and public bodies can be an undertaking. A body can be an undertaking even if not run for profit, where it competes with profit making entities or could do so.

If you should be classed as an undertaking your proposal will likely need to rely on an exemption in order to be in compliance with state aid rules. When you add your proposal for this programme, if the total aggregate amount of aid you have received from state bodies (including for example central Government departments or funders such as Big Lottery) in the last three fiscal years is less than €200,000, you will fall within the 'de minimis' limit[1] and your proposal is therefore compatible with state aid rules.

If your current proposal pushes you over the €200,000 threshold, or state aid received previously has already taken you over that threshold, your proposal will need to rely on exemptions set out in the Service of General Economic (SGEI) De Minimis Regulation or the SGEI Decision.[2] To fall under one of the SGEI exemptions, we will need to be satisfied that you are providing a service that the market does not provide, or does not provide to the extent or at the quality which OCS requires and which is in the general not the particular interest. Relying on one of these exemptions will involve the Minister for Civil Society conferring a formal act of entrustment on you and the Cabinet Office will need to be satisfied that funding your proposal will be state aid compliant before making a grant offer.

More information is provided here.

I have completed every section of the form.
We will only consider applications which have every section completed.

[1] See Commission Regulation (EU) No 1407/2013 of 18 December 2013.
[2] Commission Regulation (EU) No 360/2012 of 25 April 2012 and Commission Decision of 20 December 2011 (2012/21/EU).

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Section 1 - Your proposal

Through this section we want to understand some of the details of your proposal. You need to set out your proposal very clearly so that we can assess:

- how well your proposal fits with our desire to support an existing service. The project you are proposing should build on (for example, by reaching higher numbers of small charities) or adapt (for example, by reaching a different type of small charities) an existing service. The proposed service must have fundraising training at its core.

- how well your proposal fits with the target group we are interested in: small charities with an annual income of up to £1 million.

- how likely it is that the service you are proposing will have an impact on the intermediate outcome (increase in capability by small charities to fundraise effectively) and the ultimate goal (small charities generate more fundraising income, supporting their vital work) we are interested in.

This section is worth 50% of evaluation.

We are interested in funding projects which...	We will not fund projects which...
… build on an existing service/initiative, for instance by growing the service to reach new beneficiaries, creating partnerships with other organisations to reach new types of small charities, replicating a successful model in other areas, or adapting to reach beneficiaries in new ways such as through digital channels. This list is not exhaustive.	… might be a great idea but have little chance of getting set up in time to be fully operational by mid February 2016.
… targets small charities with an annual income of up to £1 million.	… targets any size of charities
… are building on services with promising or proven indication of	… are totally untried and untested, with little evidence to back up the

impact, with evidence/a well-evidenced hypothesis for why such a service should work.	hypothesis that they will work
… set out a convincing plan for how the project will identify and build awareness, interest and uptake amongst beneficiaries.	… provides little confidence that the project will be able to identify and build awareness, interest and uptake amongst beneficiaries.
… are large enough in scale.	… will only reach small numbers of beneficiaries.
… set out a fee and cost structure with convincing evidence that demonstrates why this structure will allow a maximum uptake of the service/support.	… set out a fee and cost structure with no evidence that demonstrates why this will allow a maximum uptake of the service/support.
… are tailored to the different needs of small charities within the threshold of up to £1m income.	… offer a ‘one size fits all’ approach.
… set out a convincing plan to capture and disseminate the lessons learnt.	… set out a limited plan to capture and disseminate the lessons learnt.

Question 1
Please describe the existing service or initiative that you plan to grow or adapt through this proposal. (maximum 400 words)

Your answer should include:

- what you are currently doing, including the number and type of beneficiaries your service reaches and the number of training opportunities you provide.
- the impact your existing service or initiative has.

Question 2
Please describe the project you would like us to fund, including how our money will help you to grow or adapt your existing service or initiative. (maximum 600 words)

Your answer should include:

- how our money will build on, grow or adapt the service. For instance, our money could help you reach more beneficiaries (please note these beneficiaries should be new to the service), different types of beneficiaries or offer more training opportunities per week/month.

- how you intend to identify and build awareness, interest and uptake amongst beneficiaries.

- what service they will receive and where, setting out the details of the training you will offer, including the total number of training sessions.

- what fundraising resource(s) you propose, available freely and beyond the immediate beneficiaries (i.e. the charities that attend the training), and how you will disseminate the resource.

- how you will deliver the service including the role played by staff.

Question 3
Who is the target beneficiary group(s) for the service? Why have you decided to focus on this group(s)? (maximum 500 words)

We will fund projects which benefit small charities with an annual income of up to £1 million.

Your answer should include:

- the specifics of the group(s) you intend to target.

- why you have chosen this group(s) and how you identified their specific needs.

Question 4
Please set out what you would charge small charities for your service and how much of those costs the OCS grant would cover. Please explain how you have arrived at the cost structure you propose. (maximum 500 words)

Your answer should include:

- the fees you would charge small charities.
- the costs of the service.
- the costs the OCS grant would cover.
- how you have arrived at the cost and fee structure you propose including any evidence that demonstrates why this will allow a maximum uptake of the service/support.

Question 5
How will you tailor your service to the different needs of small charities within the threshold of up to £1m income? One option is a diagnostic process to ensure organisations receive the type of training and support that will have the most impact, such as the diagnostic tool of the Local Sustainability Fund (LSF). Please tell us how you will tailor your service. (maximum 500 words)

Your answer should include details of how you will tailor your service to the range of different needs of the group(s) your service intends to target.

Cabinet Office launched the Local Sustainability Fund on 25 June 2015. The fund will provide grants to increase the sustainability of around 250 organisations working in the voluntary, community and social enterprise (VCSE) sector. For more information please click here.

The LSF diagnostic tool allows organisations to understand better their strengths and weaknesses, and every organisation that fills it out can receive a sustainability report. The tool takes approximately 1 hour to complete. To have a look around the diagnostic tool please click here and go to ‘Diagnostic Tool’. Then log in using the username VCSE Diagnostic and the password SCFTP1. Note that the username and password are case sensitive and spaces should be used where indicated. Please do not share these log in details more widely.

Question 6

What is the likely impact of the service you propose on the outcome and the goal we are interested in as set out in our Theory of Change (Figure 1)? What is the evidence for this? (maximum 500 words)

Your answer should include:

- a persuasive argument, including evidence, for why the activities proposed will have the impact we are looking for. We are interested in the intermediate outcome and the ultimate goal listed in our Theory of Change shown in Figure 1. Please provide details for the intermediate outcome, i.e. an increase in the capability of small charities to fundraise effectively, and the ultimate goal, i.e. small charities generate more fundraising income, supporting their vital work.

- how many beneficiaries the fundraising training will reach.

- why the fundraising resource(s), available freely and beyond the immediate beneficiaries, will add value, and how many beneficiaries beyond the immediate ones the resource(s) will reach.

- details of any other outcomes your service will deliver.

- your own Theory of Change. This is not compulsory, but we recommend to applicants to develop and attach a Theory of Change as a supporting document with the application.

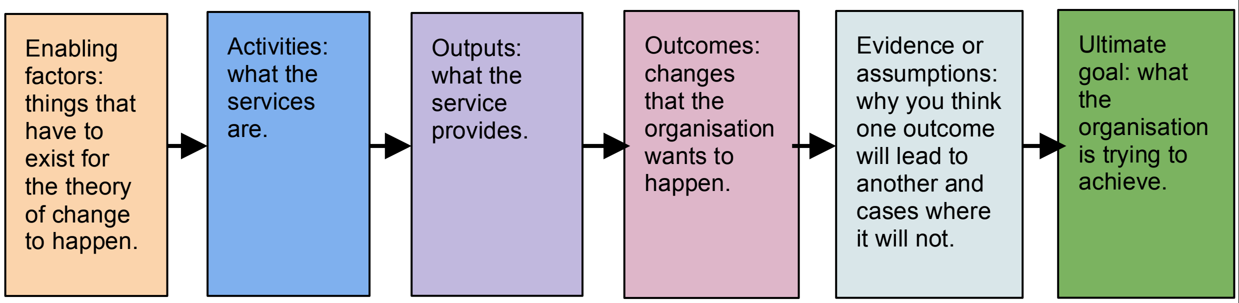
- indicate whether you have secured match funding (from an external source or from your own organisation) or whether match funding is in the offering, which would allow any OCS grant to go further.

- how you will capture and disseminate the lessons learnt.

Theory of change

New Philanthropy Capital provide guidance on writing a theory of change in “Theory of Change: The beginning of making a difference” written by Angela Kail and Christopher Lumley (April 2012). You can access this at thinknpc.org/publications/theory-of-change.

Your Theory of Change should outline how the outputs of your project lead to your intended impact. This is usually presented in a series of chains, like the one below (also from the above named publication).



You may have one overarching ultimate goal, but you will have a number of different outputs and activities for your project. You can see an example theory of change on the NPC website address above.

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Section 2 - Measurement of impact

Through this section we want to know how well placed you will be to measure the impact of your project and work with our in-house evaluator.

This section is worth 20% in the assessment.

We are interested in funding projects which...	We will not fund projects which...
... give us confidence that the organisation shares our enthusiasm for carrying out evaluation, and has the thinking, culture, people and processes in place to collect the data needed and work effectively with our in-house evaluator.	… give us concerns about the organisation's enthusiasm for carrying out evaluation; or about their thinking, culture, people and processes on collecting/analysing data and ability to work with our in-house evaluator.

Question 7
Please tell us what data you collect, and how, from the relevant service(s) that you currently run and which you plan to grow or adapt with this funding. How does this enable you to demonstrate impact? (maximum 300 words)

Your answer should include:

- what data you routinely collect.
- how you collect the data.
- how you store the data.
- who currently collects your data.

Question 8
Please tell us how you would evaluate the proposed programme, including working with our in-house evaluators to deliver a short questionnaire for before and after the training. (maximum 500 words)

We have an in-house evaluator and we will ask them to work with the successful applicant(s) to design an evaluation strategy for your service and the programme as a whole. This will include designing with you a short questionnaire to beneficiaries for before and after the training.

In this section you should include:

- who in your organisation would be responsible for working with our evaluator, and how much time they would be able to devote to it.
- what data you believe you would need to collect to measure the intermediate outcome and the ultimate goal of this programme, and how you envisage collecting it.
- how you would deliver the questionnaire.
- any assistance you feel you need from the evaluator.

Section 3 - Capacity to deliver

Through this section we want to understand how well placed you are to deliver on your proposal, delivering good value for money.

In this section, we will be looking for:

- your ability to set up your project quickly.
- strong performance management skills in place to ensure outcomes are met.

This section is worth 30% in the assessment.

We are interested in funding projects which...	We will not fund projects which...
… give us confidence in the experience of key staff and their roles within the service.	… give us concerns about the experience of key staff and their roles.
… give us confidence in the value added of any partnership work and the arrangements in place to manage the partnership.	... give us concerns about the value added of any partnership work and the arrangements in place to manage the partnership.
… set out a comprehensive mobilisation plan that gives us strong confidence the organisation will be able to mobilise quickly.	… give us concerns that the organisation will not be able to mobilise in time.
… give us strong confidence that the organisation would be capable both of spotting any dip in performance, and addressing it.	… give us concerns that the organisation would not be able to identify a dip in performance and address it.
… give us confidence that the organisation will deliver value for money.	… give us concerns about whether the organisation will deliver value for money.

Question 9
Who will be directly responsible for the day-to-day running of the project, and what is their experience? (maximum 500 words)

Your answer should include:

- names and job titles of relevant staff.
- their experience.
- if relevant, details of the roles you plan to recruit and the skills and experience you will be looking for.

Question 10
If you are working in partnership with other organisations, who are they and how will you manage your relationship with them? (maximum 500 words)

Your answer should include:

- who are your partner organisations.
- what is their experience.
- what value will they add to the service you propose.
- what arrangements will you put in place to manage your relationship with them.

Question 11
We plan to confirm grants to successful applicants in December 2015. We want the projects we fund to be fully operational by mid February 2016 so between December 2015 and mid February 2016 projects will need to set up/grow at speed. Please set out your mobilisation plan detailing how you would set up/grow your project between having your grant confirmed and mid February 2016. (maximum 500 words)

We want to be sure that you have a good understanding of, and robust plans in place for, what you will need to do if you are to grow/build on/adapt your existing service in time to be delivering a high-performing service by mid February 2016.

Your might want to include:

- recruitment of staff/volunteers.
- identification and targeting of small charities who will benefit from your service.
- liaising with our in-house evaluators.
- designing the short questionnaire for before and after the training that small charities will receive.
- setting up processes for data collection.
- risks that may impact on delivery.

Question 12
How will you know, during the delivery of your project, whether or not it is having the impact you intend? And how would you act to improve performance if necessary? (maximum 500 words)

We want to be confident that your service will have the impact you hope it will, and that you will be able to turn things around if your impact is not as good as expected. So we want to be sure you will be able to spot when things are not going as planned, and act to manage performance upwards if necessary.

Question 13
Please specify the milestones and key deliverables for your proposal in the table provided. This should include at least the number of training opportunities provided, the number of beneficiaries attending the training, the provision of the fundraising resource(s) and the number of beneficiaries, beyond the immediate beneficiaries, the fundraising resource(s) reaches.

Your project milestones need to take into account timeframes and deadlines for delivery of activities and outputs. They need to link to the proposed spend and the overall budget for your project. Your project will be monitored and assessed against these milestones and this may form part of the grant contract if we do make you an offer.

You should use the table provided and include:

- the number of training opportunities provided.
- the number of beneficiaries supported through the training.
- the provision of a fundraising resource(s), available freely and beyond the immediate beneficiaries (i.e. the charities that attend the training), that complements existing free resources.
- the number of beneficiaries beyond the immediate beneficiaries, reached through the fundraising resource(s).
- any other milestones/key deliverables you think relevant here.

Question 14
Please provide a budget breakdown for your project.

Please include the costs (e.g., staff, travel, training) for your project. We might require you to provide us with more detail on your spend profile during the assessment process, if you are successful at the initial stage. You should use the table provided.

Question 15
Please list any other recent funding proposals you have made to Cabinet Office, other Government departments or other external funders for this kind of work.

Please list funding proposals in the last three years, how much you have applied for, what your bid was for and whether or not you have been successful.

Funder	What was the funding for	Amount requested (£)	Secured? Y/N

Question 16
Please complete the table below to show your organisation's recent financial track record for the last two financial years for which you have audited accounts, and management figures for the current year to date.

Please enter your financial information in the table provided. We might ask for a copy of your audited accounts and management accounts during the assessment process, if you are successful at the initial stage.

	Annual accounts 2013 – 2014	Annual accounts 2014 – 2015	Management figures YTD	Projected full year figures
Total Income				
Total expenditure				
Surplus/deficit				
Current assets				
Current liabilities				
Fixed assets				
Term liabilities				
Unrestricted funds				
Restricted funds				
Total funds				

State aid

Question 17
Do you consider that OCS providing funding for your proposal will be compliant with the EU state aid rules?

Please answer ticking yes or no and provide brief reasons. Please refer to the discussion of the state aid rules at pages 15-16 of this guidance when answering this question.

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PART SEVEN If you are awarded a grant

Acceptance of funding

All successful applicants will be notified at the end of October 2015. If you are successful in your application you will be required to accept the offer of funding within one month of the date of the offer letter. During that time we may also ask you to work with the in-house evaluator to ensure that your project can be robustly evaluated. Any offers not accepted within this timescale may be withdrawn unless an extension to the offer has been agreed in writing (email and letter).

To accept our offer the lead organisation must sign both copies of the offer letter and terms and conditions, returning one copy to us and keeping the other for your records. You must send us a certified copy of a Board resolution accepting the investment offer and authorising specific individuals to sign the Offer Letter and draw down requests. We can provide a sample Board resolution to successful applicants on request.

In addition, we will require:

- **An original bank statement** (less than 3 months old) for the account into which the funds will be paid. This account must be in the legal name of your organisation. We will copy it and return to you.

- **A completed Bank/Building Society Account Details Form**. This form asks you to provide some information about your bank account and account signatories. You will need to take this form to your bank and have them counter sign this.

As well as this general documentation we may require other evidence as specific pre-conditions relating to your investment and this must be provided before the drawdown of funds. For example, we would require confirmation that any relevant match funding that your proposal is reliant on is secure.

Your Offer Letter will provide more detailed guidance on the documents required in order to draw down your grant.

Unsuccessful applications

All unsuccessful applications will be informed by December 2015. Due to the volume of applications that we are likely to receive we will not be able to provide detailed verbal feedback on unsuccessful cases. We will however write to applicants indicating the key reason for the application being unsuccessful.

Please note that the decision will be final.

If you have a complaint about the way your application is handled, email us at socialaction@cabinetoffice.gov.uk.

Reporting and monitoring

Drawing down money

Payment will be made according to the payment schedules agreed in the grant offer, outlining key performance indicators and timeframes required for the programme. Payments will not be made if required key performance indicators have not been achieved. Changes to payment schedules can be made, but will need to be agreed by both parties.

When you have fulfilled your pre-conditions you can then start to draw down the money. All agreed funding must be drawn as agreed and spent within 3 months of receipt of funding at each instalment.

A Drawdown Request Form will be included with your Offer Letter. When you are ready to drawdown the money you need to complete this form, attach any evidence requested and ensure it is signed by someone who is authorised by the Board Resolution / Management Committee minutes before submission to us.

Funds will be transferred to your bank account within 6 to 10 working days after the receipt of your Drawdown Request Form.

Monitoring requirements

It is a condition of any investment awarded that recipients must submit information relating to expenditure, achievement of key performance indicators and evaluation and any other subject related to the investment. We may ask you to take part in follow up surveys and provide materials for case studies and other publicity so that other organisations can learn from your work. In addition to the regular reporting, successful applicants will also need to provide ad hoc information about programme delivery. We will aim to give as much notice as possible.

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PART EIGHT Advice and support

Have a question?

Please email us by 1st October at socialaction@cabinetoffice.gov.uk. Please note that after that date, we may not be able to answer your queries.

We will publish the answers to questions we received by 1st October by potential applicants by 6th October 2015.