

# SUCCESS CHECKLIST

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By working together we can make sure that your charity has the best chance of finding funds from Trusts and Foundations. Whilst we make no claims to guarantee funding from any one particular Trust, we can say that when you apply to many Funds you have a greater chance of funding than from a small number of Trusts.

This checklist is to give you the best chance of finding the funds you need.

It is not intended to pry into your affairs or to criticise the Charity if some items are not available.

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- ▶ Your Charity Number :.....
  - ▶ Vision: Our vision is for a world where :.....
  - ▶ Mission: We will :.....
  - ▶ Values: We believe in :.....
  
  - ▶ Do you have your accounts at Charity Commission?
  - ▶ Can we have a paper copy of accounts in A4 or A5?
  - ▶ Do you also have electronic copy of accounts in DOC or pdf?
  - ▶ Can you supply a digital signature of the CEO or Chair?
  - ▶ Do you have a successful letter to a Trust that was successful?
  - ▶ Is next year's budget in a spreadsheet:
  - ▶ Do you have someone "in charge" that you can delegate as liaison?
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## The Project:

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- ▶ Has it a name?
- ▶ Has it been run before?
- ▶ Is it National or local to you?
- ▶ Who will benefit? *Old, Young, Sick, Poor etc.*
- ▶ How will they benefit?( live longer, avoid isolation, find refuge....etc.)
- ▶ What would happen if the project did not happen?
- ▶ Do you have detailed project costs on spreadsheet?

- ▶ Do you have pictures from a previous project?
- ▶ Can you write down the “Outcomes” on a single sentence?

Shopping list (If the Trust do not pay for the whole project we will also give them some smaller value choices. This is the “Shopping List”)

£.....will pay for.....

£.....will pay for.....

£.....will pay for.....

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▶ SMART objectives:

Time Scale:

Amount needed by this Trust:     £

Total amount needed:             £

Other Trusts asked:

- 1)
- 2)
- 3)

Referees?

Two people of high standing that are aware of your project:

Name  
Rank  
Address

Name  
Rank  
Address

Telephone number  
Email address:

Telephone number  
Email address:

All questions to :  
[The Trust Team](http://www.the-trust-team.org) 01491 575267  
<mailto:nigel@the-trust-team.org>