Frequently Asked Questions

Who is eligible to apply for funding?

Generally, funding applicants include:
- Registered Charities
- Community Interest Companies (CICs)
- Community Amateur Sports Clubs (CASCs)
- Companies Limited by Guarantee (LTDs)
- Individuals (in certain circumstances, funding may also be available).

What are the organisational structure and financial requirements?

The specific requirements vary depending on whether you are an organisation or an individual applicant.

For Organisations (Charities, CICs, CASCs, Companies Limited by Guarantee):

To be eligible for most funding opportunities, organisations typically need to meet the following structural and financial criteria:
- **Certificate of Incorporation:** Proof of your organisation's legal registration.
- **Governing Document:** A constitution that includes an asset lock provision.
- **Financial Documentation:** A recent bank statement issued in the name of your organisation.
- **Bank Account Structure:** A bank account requiring two unrelated signatories for transactions.
- **Leadership Structure:** A Minimum of three directors who are unrelated to each other, none of whom hold significant individual control.
- **Financial Records:** Current annual accounts or a comprehensive income and expenditure report.
- **Redacted Bank Statement:** A redacted bank statement, no more than three months old from the application submission date, clearly showing the address and name of the applying organisation.

Each funder will require one or all of these documents. Fundplan will securely hold these on its database for your convenience.

For Individuals (where eligible):

When funding opportunities are open to individuals, the requirements are tailored differently and typically include:
- **Proof of Identity:** Such as a passport or driving licence.
- **Proof of Address:** A utility bill or council tax statement, dated within the last three months.
- **Personal Bank Statement:** A recent statement from your personal bank account.
- **Project Proposal & CV:** A detailed description of your project or proposal, along with your curriculum vitae or resume outlining relevant experience.

- Please note that organisational requirements like an "asset lock," multiple bank signatories, or a board of directors do not apply to individual applications.

Which key policies and documents are generally required?

Organisations seeking funding are typically expected to have several key policies and documents in place to demonstrate good governance and operational integrity. These often include:

1. **Safeguarding Policy (Children and Vulnerable Adults):** A comprehensive policy addressing the protection of children and vulnerable adults.
2. **Equality, Diversity & Inclusion (EDI) Policy:** Demonstrating your commitment to inclusivity standards.
3. **Health and Safety Policy:** Outlining your workplace safety protocols.
4. **Data Protection & Privacy Policy:** Covering your approach to information security and personal data.
5. **Risk Assessments:** Thorough evaluations for hazard identification and mitigation.
6. **Public Liability Insurance:** Providing essential liability coverage.

What are the requirements for financial statements?

The need for formal financial accounts depends on your organisation's maturity:

- **Established Organisations:** If your entity has been operational for 18 months or longer, you will need to provide a complete set of financial accounts.
- **New Organisations:** For newly formed groups, an income and expenditure forecast will suffice.

How do I provide the required information?

To ensure a smooth and efficient grant application process, Fundplan will email you a form to complete with all the required information. This form will systematically gather the necessary project details and prompt you to provide any relevant supporting documents that need to be attached to your application.

Can you explain the process for using Fundplan's services?

When you choose to work with Fundplan, you'll be paired with an experienced bid writer. This expert will collaborate with you to develop your project. Afterwards, they will prepare the funding application and submit it to you for your thorough review and final approval. **All applications are only submitted upon your explicit approval, unless you instruct otherwise in writing. Once the draft application is approved for submission, or if the customer modifies it for submission, the responsibility for the application's outcome rests solely with the customer.**

Who submits the grant application?

You have two primary options for submitting your grant application:

- **Client Submission:** The easiest method is for you to copy Fundplan's final draft application into the relevant funder's online portal and submit it yourself using your own organisation's email address.
- **Fundplan Submission:** Alternatively, Fundplan can set up a shared email address, fill out the application form on your behalf in the funder's portal, and submit it for you.

Can Fundplan help us develop project ideas?

Absolutely! Fundplan **specialises** in helping organisations diversify their project offerings and develop compelling ideas. This can involve strategic thinking, such as researching local community needs through collaboration with entities like local police forces or broadening the demographic reach of your programmes. For instance, a sports-focused initiative could be framed to highlight mental health benefits and reduce social isolation. Fundplan's team can guide you in formulating projects that are best aligned with potential funding opportunities.

Alternatively, for clients who prefer a more straightforward approach, Fundplan can also prepare bids based on general principles and available information, with minimal specific instructions or consultation from you, for direct submission.

How much do Fundplan's services cost?

Fundplan operates on a transparent pricing structure. For ongoing support, Fundplan offers flat monthly fees for its service tiers, with no additional charges incurred if your bids are successful:

- **Single, one-off applications: Fees can range from £100 + VAT to £1,200 + VAT.**
  However, the average fee is £300 + VAT for most applications.

For single, one-off bids, we will only proceed if we agree on a price, with 50% paid upfront and the remaining 50% on delivery of the draft for your approval, and then pay the remaining 50% for application submission.

Please note there may be additional charges if you wish us to attend online meetings on your behalf, as some funders may require @ £75 VAT.

> **Subscriptions:**
- **Six Bids Annually: £150 per month + VAT**

- **Twelve Bids Annually: £300 per month + VAT**

For subscriptions, we require the full fee to be paid on an agreed date each month for 12-month subscriptions and every 2 months for 6-month subscriptions. Afterwards, we will send you the draft application for your

approval, and we will make adjustments as needed for the application submission.

For single, one-off bid applications, Fundplan's fees generally range from £100 + VAT to £1,200 + VAT.

This variation largely depends on the complexity of the funder's application process and the level of communication and time required from both Fundplan's team and your organisation.

For example, a bid for the ASDA Foundation might be around £100 + VAT, given its straightforward nature. In contrast, a more complex application, such as for Arts Council England, could cost up to £1,200 + VAT, reflecting the extensive time and effort involved for all parties.

The subscription service usually includes a mix of both smaller and larger applications.

What other services does Fundplan offer?

In addition to its core bid writing expertise, Fundplan offers a range of supplementary services to support your organisation:

- **Organisation Set-up:** Fundplan can provide guidance and assistance with establishing Community Interest Companies (CICs). This service is typically **£350 + VAT**.
- **Policy Development:** Fundplan's team can help you formulate essential policies, such as safeguarding procedures, **EDI policies**, and risk assessments. This service is typically **£75 + VAT** per document.

What are Fundplan's cancellation and cooling-off policies?

Fundplan aims for transparency and fairness regarding service agreements.

- **Initial Cooling-Off Period (Both Models):** For all services, you have a 14-day cooling-off period starting from the date of agreement. During this time, if no substantial work has commenced on Fundplan's part, you may cancel for a full refund.
- **Subscription Model Cancellation:** After the initial 14-day cooling-off period, you may cancel your subscription at any time by providing 30 days' written notice. You will be billed for the current month and the 30-day notice period. Any bids worked on within this notice period will be counted towards your annual allocation.
- **One-Off Application Model Cancellation:**
    - **Before Work Commences:** If you cancel a one-off application before Fundplan has started any work (and within the 14-day cooling-off period), a full refund will be provided.
    - **After Work Commences (Before First Draft):** If you cancel after work has begun but before Fundplan has provided the first complete draft of the application, a cancellation fee of 50% of the agreed bid price will apply, reflecting the initial time investment in research and project scoping.

- o **After First Draft Provided:** Once Fundplan has provided the first complete draft of the application for your review, the full agreed bid price becomes payable, and no refunds will be issued upon cancellation, as the primary service delivery has been rendered.

Can we apply for funding for staffing and running costs?

Yes, both staffing and general running costs can often be integrated into specific project budgets. Additionally, it is possible to apply to funders for core operational funding. However, to be eligible for core cost support, your organisation will typically need to have at least one complete set of financial accounts.

Is funding available for building redevelopment projects?

Please note that Fundplan's services do not currently cover grant applications specifically for building or major capital redevelopment projects. These types of bids often require a highly specialised approach. Fundplan recommends seeking a dedicated capital bid writer who **specialises** in this area for such applications.

How long does it typically take for funding decisions?

Funders generally require between three and four months to process applications and communicate their award or decline decisions.

What if an application is rejected due to a Fundplan error?

While every effort is made to avoid errors, in the unlikely event that an application is rejected due to a technical error made by Fundplan, Fundplan will take immediate action. Fundplan will either correct the error and resubmit the bid or provide you with the necessary corrections so you can submit them yourself, all free of charge. If the application deadline has passed and resubmission is no longer possible, Fundplan will provide a credit or refund. Please note that Fundplan cannot be responsible for any errors in information provided by the customer.

What if a bid is declined for a minor issue?

If a funder declines an application but invites rectification for a minor issue (e.g., a missing detail or a small clarification), Fundplan will address the funder's feedback and resubmit the bid free of charge, should the customer wish to proceed.

What kind of reporting is needed if a bid is successful?

Reporting requirements vary significantly from one funder to another. These can range from a simple progress survey to comprehensive activity reports, often including photographic evidence. Your dedicated bid writer can clarify the specific expectations for each successful application. The client must take responsibility for submitting all required reports by their respective deadlines.

Does Fundplan write the grant reports for a successful application?

Fundplan does not directly write the grant reports required after a successful application. However, Fundplan is happy to provide advice and guidance on what funders expect in their reporting, helping you to understand and meet your obligations.

Is an online presence essential for funding applications?

Funders increasingly **scrutinise** an organisation's online visibility. They expect applicants to have the capacity to promote their activities digitally and to tag them in relevant social media posts. Fundplan has observed instances where funding applications have been declined due to a client's insufficient online presence.

Does Fundplan use AI?

The use of AI and LLMs is only beneficial if you employ them as tools for improvement within any expert field. This demands a critical eye, grounded in extensive experience in your area of expertise, to evaluate the AI's output. Additionally, the input prompts also require expert knowledge.

Funders are wary of applications created by AI and LLMs, and generally perceive them negatively if they can identify that the content has been produced solely by AI. AI/LLM outputs tend to be generic and easily recognised by most funders.

However, assistive AI can enhance tone and grammar and clarify points when necessary. It is also valuable for meeting strict word limits and rephrasing for efficiency.

Fundplan generally avoids using LLMS and AI, as it might appear obvious to the reader.