Guidance on preparing your application

Format of the proposal documents

Try to be succinct and clear with your application. It needs to read as a simple description of what you want to do and why, to someone not familiar with your work. Do not tell us everything you know about a topic. If we have additional questions we will ask you during the assessment phase. Please also avoid jargon and terms that only your organisation might know.

Please submit the following as PDF documents using the upload buttons below:

1. A full proposal no more than six pages long, addressing the points outlined below. Please label this PDF document "1. [your organisation name] - full proposal"
2. A two-page summary of your project, following the guidance note provided. Please label this PDF document: "2 [your organisation name] - summary"
3. A **supplementary budget** of not more than one page. You can include this as a third page with the summary (above), or attach it separately named: "3 [your organisation name] - budget"
4. Supporting evidence can be supplied in one **appendix** where relevant - but please make these the exception and limit them in length.

Content guidance

1. Preparing Your Full Proposal

A)   Standard points to be covered (using the headings below, in the following order):

1. **Applicant organisation:** In no more than a few sentences, set out who you are. It might be helpful to mention when your organisation was founded, its size, legal status and what its primary activities are.

2. **Background:** Describe the context for the work for which you are seeking support, including reference to existing literature and / or practice. The purpose of this section is to demonstrate that you have a familiarity with the field and an understanding of how your work fits into what has gone before. You should also indicate the degree to which your work will build upon or develop existing work (yours or that of others)

3. **The problem:** State clearly and concisely what the specific issue is that you feel needs to be addressed – and why.

4. **What the project aims to achieve:** Provide a summary of what your project will do and explain why you think this is the most effective response to the problem identified.

5. **Methods:** State in more detail what your proposed activities and outputs are. Trustees will be carefully reviewing their potential to lead to the proposed outcomes, so please provide as much information about them as you can and how they will meet your goals.

6. **Outcomes:** What specific outcomes are you aiming to generate? Who/what exactly needs to change and how will this happen? How will you know whether you have been successful?

7. **Strategic impact:** How will your work contribute to the achievement of one of the target outcomes under the Foundation's Building Resilient Economies programme - i.e. changing the financial system or the development of local economic resilience? What is your 'theory of change' for this?

8. **Timetable:** Tell us how long it will take (how many months) and when the stages of the work outlined in the Methods section will occur. This will be a useful way for both the Foundation and your organisation to monitor progress should the project receive funding.

Budget
- It should be clear how much the work will cost in total and how much you are requesting from the Foundation.
- Please list any other existing or anticipated sources of income for the work, including any pending applications with other funding bodies. You should be clear as to whether this is confirmed or unconfirmed funding.
- You do not need to detail every item of expenditure, but you should put costs under clear headings.
- If you are applying for funding for more than one year, your budget should cover the entire period.
- An example of a budget format is given in the appendix to this guidance sheet. You may adapt it to suit your project structure.

B) Bespoke points to cover

Your outline application may have generated particular questions, concerns or suggestions amongst our Trustees; if so, these will be described in the covering email. Make sure you address these clearly within your proposal.

However, please bear in mind that these are simply observations by trustees and that you do have the option of disregarding any suggested changes and trying to justify your existing stance instead: we never encourage applicants to make changes to the substance of their applications if they are doing this simply in order to try to increase their chances of receiving funding from us and are unhappy about doing so. The one exception to this relates to any comments that our Trustees make about cost or value for money. Applicants should carefully examine their costings in relation to any such observations, as under-costed or over-costed projects may not fare well in assessment.

2. Preparing Your 2-Page Summary

Please use this guide to structure the key points of your summary stage 2 proposal to present to our Trustees. Your stage 2 assessment summary should not exceed 2 A4 pages using normal margins and Arial 11 point type and should be presented in PDF or MS Word.

Please include:

1. Your organisation name
2. Project title

3. A brief summary of your proposal (circa 50 words)
4. The problem or issue you are addressing
5. The solution or intervention you propose
6. The main activities that our funding will pay for (please list up to three activities that will be your main focus)
7. The outcomes you expect to happen as a result of your actions (please list up to four outcomes that will be the key results of your project)
8. Longer term - how will things be different as a result of your project?

This summary is read by busy trustees so here are some tips for good summaries:

- Do: make your proposal clear and concise – your 2 page "elevator pitch".
- Don't: use hyperbole and flowery language – it can get in the way of understanding the work you want us to fund.
- Do: stick the page limit – longer and more words is not better,
- Don't: make reference to documents or reading that is not included in the summary – it makes disjointed reading.

- ## Budget - Example of a budget format:
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Area of expenditure	Total Cost £	Request to Friends Provident Foundation £	Balance required £	Source(s) of balance
Cost area 1				
Cost area 2				
Cost area 3				
Cost area 4				
Total costs				

The criteria against which applications are judged

When preparing your second stage application you may want to bear in mind the factors that our Trustees use when deciding whether to fund the various applications they see. They judge each application against the following set of criteria:

- The strength of the applicant's articulation of, and analysis of, the problem(s) to be addressed and the case made for how their project will help to solve it.

- The fit with the overall aims of the Foundation's funding programme, in terms of helping to build a more fair and sustainable 4D economic system that is designed to include those who are most vulnerable to market failure.

- What the potential strategic impact is and, therefore, how important a piece of work it would be for the Foundation to support.

- The value for money that the funding proposal represents.

- The level of risk involved.